

COUNTY OF ORANGE

SOCIAL SERVICES AGENCY



REQUEST FOR PROPOSAL (RFP)

FOR

CLIENT ADVOCACY SERVICES

RFP No. RFP-063-3095910-JL

RESPONSES MUST BE SUBMITTED ELECTRONICALLY TO:

<https://secure.procurenow.com/portal/ocgov>



**County of Orange
Social Services Agency
Procurement and Contract Services
500 N. State College Blvd
Orange, CA
92868**

**PROPOSALS MUST BE RECEIVED ON
OR BEFORE**

Wednesday, November 4, 2026

4:00 pm

SCHEDULE OF ACTIVITIES

Release of RFP Solicitation	October 2, 2026
Question Submission Deadline	October 21, 2026, 2:50pm
RFP Proposal Submission Deadline	November 4, 2026, 4:00pm
Tentative Interviews	December 2, 2026

SECTIONS

- SECTION 1. INTRODUCTION AND INSTRUCTIONS TO RESPONDENTS
- SECTION 2. PROTEST PROCEDURES
- SECTION 3. OCLSB AND DVBE PREFERENCE POLICIES CERTIFICATION REQUIREMENTS
- SECTION 4. PROPOSAL SCORING CRITERIA
- SECTION 5. DESCRIPTION OF SERVICES and SCOPE OF WORK
- SECTION 6. VENDOR RESPONSES

Attachments:

A - Client Advocacy Services Model Contract

B - Sample - Rent Free License

SECTION 1. INTRODUCTION AND INSTRUCTIONS TO RESPONDENTS

1.1 INTRODUCTION

The County of Orange, Social Services Agency (hereinafter referred to as “County”), is soliciting proposals from qualified firms (hereinafter referred to as “Respondents”) for Client Advocacy Services. Respondents must meet the minimum qualifications and requirements as set forth within the Request for Proposals (RFP) and be capable of providing services identified in the Scope of Work herein.

The County intends that the successful Respondent shall provide Client Advocacy Services proposed in accordance with contract requirements set forth in the solicitation and Model Contract, including Attachments.

1.2 COUNTY HOLIDAYS DURING SOLICITATION PERIOD

During this solicitation period, the Social Services Agency will be closed on the following County holidays: <https://hrs.oc.gov/employee-relations/employee-resources>

1.3 INSTRUCTIONS TO RESPONDENTS AND PROCEDURES FOR SUBMITTAL

- A. Responses are to be uploaded via the County's eProcurement Portal at <https://procurement.opengov.com/portal/ocgov>. For assistance on uploading Response via County's eProcurement Portal, please contact procurement-support@opengov.com or <https://help.procurement.opengov.com/en/>
- B. Examine the Contract Documents and the site of the proposed work carefully before submitting a Response for the work contemplated. Investigate the conditions to be encountered, as to the character, quality, and quantities of work to be performed and materials to be furnished and as to the requirements of all Contract Documents.

The County has attempted to provide all information available. It is the responsibility of each Respondent to review, evaluate, and, where necessary, request any clarification prior to submission of a Response. If any person contemplating submitting a response to this RFP is in doubt as to the true meaning of any part of the solicitation documents attached hereto or finds discrepancies in or omissions from the specifications, they may submit a written request for clarification/interpretation to the County Deputy Procurement Agent (DPA) via the County's eProcurement Portal under the bid page for this solicitation.

If clarification or interpretation of this solicitation is considered necessary by County, an addendum shall be issued, and the information will be posted via the County's eProcurement Portal. Any interpretation of, or correction to, this solicitation shall be issued by the DPA. It is the responsibility of each Respondent to periodically check the County's eProcurement Portal to ensure that they have received and reviewed any and all addenda to this solicitation.

The County will not be responsible for any other explanations, corrections to, or interpretations of the documents, including any oral information. If an addendum is issued, Respondents must acknowledge the addendum via the County's eProcurement Portal.

All questions or requests for interpretations must be received within this solicitation by Wednesday, October 21, 2026, before 2:50 pm.

Respondents are not to contact other County personnel with any questions or clarifications concerning this RFP.

The DPA will provide all official communication concerning this solicitation. Any County response relevant to this solicitation other than through or approved by the DPA is unauthorized and will be considered invalid.

- C. Responses must be valid for a period of at least three hundred sixty-five (365) calendar days from the closing date and time of receipt. No Response may be withdrawn after the submission date.
- D. Each Respondent must submit their response electronically via the County's eProcurement Portal.
- E. All pages must be numbered and identified sequentially by section. Responses must be organized and indexed as outlined in the Response Requirements Section. It is imperative that all Respondents comply, exactly and completely, with the instructions set forth herein. All responses to this solicitation shall be type written (12-point Times New Roman font, and single line spacing format on 8.5 x 11-inch sized document) or word-processed (except where otherwise provided or noted), concise, straightforward, and must fully address each requirement and question. Paraphrasing the RFP questions is not permitted. Although not as a substitute for a complete written response, additional material, such as technical documents, may be referenced in any response if the material is included in the same section as additional information. Text located in other documents (e.g., references to "see attached" or hyperlinks) will not be evaluated or scored.
- F. **Responses are not to be marked as confidential or proprietary.** The County may refuse to consider any Responses so marked. All Responses and supporting documents will be subject to the provisions of the California Public Records Act (California Code Government Code 7920.000 et seq.) (PRA) and will be disclosed or withheld in accordance therewith. The County shall not be liable in any way for disclosure of any such records. Additionally, all Responses shall become the property of the County. Respondents should not request that certain information be treated as exempt, and statements in the Responses should not be marked as confidential or proprietary. In the event that any information is marked as confidential or proprietary, as it may be absolutely necessary, Respondents have the sole responsibility of obtaining any applicable injunctive reliefs to prevent the

disclosure of such confidential proprietary information in connection with any request made to County pursuant to PRA or a subpoena for disclosure of such information.

- G. Each Respondent shall exercise reasonable care and diligence to avoid submitting a Response that could result in a conflict of interest if Respondent were to be selected. This obligation shall apply to the Respondent, the Respondent's employees, agents, and relatives, sub-contractors, and third parties associated with accomplishing work and services in Response. In the event Respondent has done work for the County on this Project in the past or has reason to believe that a conflict of interest may exist for Respondent in regard to this Project, Respondent should consult with its legal counsel prior to responding to this solicitation. Any Respondent who is found to have an actual conflict of interest may have its Response rejected on that ground.

Respondent, its employees and/or consultants may be subject to the provisions of the California Political Reform Act of 1974 (the "Act"), which (1) requires such persons to disclose any financial interest that may be materially affected by services provided under this Contract, (2) prohibits such persons from making, or participating in making, decisions that could reasonably affect such interest; and (3) may require the filing a Statement of Economic Interest (Form 700).

If subject to the Act, Respondent shall conform to all requirements of the Act. Failure to do so shall constitute a material breach and is grounds for immediate termination of the Contract by County. Respondent shall indemnify and hold harmless County for any and all claims for damages resulting from Respondent's violation of this Section.

- H. By submitting a Response, the Respondent represents that it thoroughly examined the County's requirements, is familiar with the services required under this solicitation and is qualified and capable of providing the services to achieve the County's objectives.
- I. Each Respondent must submit its Response in strict accordance with all requirements of this solicitation and compliance must be stated in the Response. **Deviations, clarifications and/or exceptions must be clearly identified and listed separately as alternative items on additional information section for the County's consideration as specified in the Response Requirements Section, "Statement of Compliance."**
Note: Allow sufficient time to upload all required files. The County's eProcurement Portal will not allow any uploads after the due date and time specified herein, e.g., if Part 1 and 2 uploaded successfully at 1:58:38 P.M. and Part 3 is in progress of being uploaded at 2:00:01 P.M., Part 3 will not upload successfully.
- J. Pre-contractual expenses are not to be included in the response. Pre-contractual expenses are defined as including, but not limited to, expenses incurred by the Respondent in: a) preparing the response to this solicitation; b) submitting that response to the County; c) negotiating with the County any matter related to the Respondent's response; and d) any

other expenses incurred by the Respondent prior to the date of award and execution, if any, of the Contract.

- K. Any Response may be construed as non-responsive and ineligible for consideration if it does not comply with the requirements of the solicitation, including but not limited to technical features, acknowledgment of receipt of addenda, and page number limits, etc. These are common causes for deeming a Response non-responsive.
- L. Where two or more Respondents desire to submit a single Response to this solicitation, they must do so on a prime/subcontractor basis rather than as a joint venture. The County intends to contract with a single firm that may subcontract with multiple firms (team) but not with multiple firms doing business as a joint venture.
- M. County does not require and neither encourages nor discourages the use of lobbyists or other consultants for the purpose of securing business.
- N. **The County requires a valid D-U-N-S number prior to Contract Award. If needed, your company may obtain one at no cost at www.dnb.com. If you are unable to provide/obtain a D-U-N-S number, please indicate so in your submission response.**
- O. **The County requires a valid Unique Entity ID (UEI) number and full registration prior to Contract Award. Your company must obtain one at no cost at www.usfcr.com. If you are unable to provide/obtain a UEI number, please indicate so in your submission response.**
- P. Effective from the issuance date of this solicitation until a Contract is awarded or the solicitation is withdrawn, all individuals or entities responding—including their employees, agents, representatives, proposed partners, subcontractors, members, lobbyists, or attorneys (collectively "Respondents")—are prohibited from engaging in any direct or indirect communication with County personnel involved in the selection process, except with the designated DPA. Respondents may continue conducting business with the County on matters unrelated to this solicitation and may communicate with County staff, provided the solicitation is not discussed. Any attempt to engage in discussion regarding this solicitation with anyone other than the designated DPA will be presumed to create an unfair competitive advantage and may result in disqualification.
- Q. After the closing date and time for receipt of Responses, evaluation, and if requested by the County, in-person interviews will commence. Respondents who submit Responses most responsive to the County's requirements may be asked to give a presentation of their response to County staff. The County makes no guarantee as to the number of Respondents selected for in-person interviews. Selected Respondents should be prepared to make its presentation within five business days after notification and be prepared to discuss all aspects of its response in detail, including technical questions regarding the response.

Respondents shall not be allowed to alter or amend its response through the use of the presentation process.

1.4 MINIMUM QUALIFICATIONS/REQUIREMENTS

Respondents shall meet the following minimum requirements and qualifications to proceed to the evaluation process. Failure to have the ability to, upon County request, provide any of the items requested below may result in disqualification of your response. These qualifications must be maintained during the term of any resultant Contract.

- A. Must have the ability to do business in Orange County, California.
- B. Complete all required Vendor Response questions of the solicitation.
- C. Provide all required information, complete all required Exhibits and Forms, and pass all IT security requirements.
- D. Certify all sections of the RFP Model Contract, including security requirements.
- E. Have five years of consecutive, recent experience in providing services that are the same as or similar to those services being requested in the RFP.

1.5 EVALUATION PROCESS

Responses deemed to meet all minimum solicitation requirements will be scored based on the established evaluation criteria, and will be assigned points that measure the responsiveness to each identified criterion. The total number of points earned will be tallied for each Response, based upon the Respondent(s) submitted written materials.

Responses shall be evaluated by an Evaluation Panel of job knowledge experts on the basis of the responsiveness to the requirements in this RFP. The County may request clarifications, or otherwise verify the contents of the Response, including information about the Respondent, Contractors and sub-contractors.

The scoring is based on evaluation of the Response as measured against the Scoring Criteria, which includes County of Orange Procurement Preference Policy, in accordance with Sections 1.8-103 and 4.3-112 of the 2026 County Contract Policy Manual (CPM). A copy of the 2026 CPM can be found at <https://cpo.oc.gov/cpm>. Responses will be evaluated from the most advantageous to the least advantageous to the County.

1.6 SELECTION/AWARD PROCEDURES

Upon the completion of the evaluation process, the Evaluation Committee will make a recommendation for an award to the County's DPA. Final award determination shall be subject to reference checks and past performance.

The Model Contract contained herein this RFP is the Contract proposed for execution. It may be modified to incorporate negotiated items and other pertinent terms and conditions set forth in this RFP, including special conditions and requirements and those added by addendum, necessary

attachments and/or exhibits, and to reflect Respondent's response and qualifications. Terms and conditions are subject to change between the release of this RFP and implementation of the Contract, and may be added before the Contract is finalized. Any additional exceptions to the terms and conditions made by any Respondent after submission of its Response may result in its elimination from further consideration.

Exceptions to the terms and conditions of the Model Contract or the statements regarding Respondent's inability to comply with any of the provisions thereof are to be declared in the response to the RFP in VENDOR RESPONSES - Statement of Compliance.

Negotiations may or may not be conducted with the finalist(s); therefore, the response submitted should contain Respondent(s) most favorable terms and conditions, since the selection and award may be made without further discussion or need for clarification. Any additional exceptions to the terms and conditions made by any Respondent(s) after submission of its response may result in elimination from further consideration.

The County will enter into negotiations with the selected Respondent and award a contract upon completion of negotiation of fees and contract terms. The award requires approval by the County Board of Supervisors.

If a satisfactory Contract cannot be negotiated in a timely manner, County, in its sole discretion, may terminate negotiations with the selected Respondent(s) and begin negotiations with the next Respondent(s).

Selected Respondent(s) shall not have any outstanding debt with County, or shall be in the process of resolving outstanding debt to the County's satisfaction, prior to entering into and during the term of the resulting Contract.

1.7 RIGHTS RESERVED TO COUNTY

The County reserves the right to:

- A. Make use of any information or ideas in the responses submitted.
- B. Request response revisions and hold discussions and negotiations with any Respondent as necessary to serve the best interests of the County.
- C. Seek publicly available information about the Respondents.
- D. Conduct, or not to conduct, oral interviews and/or presentations with the highest-scored Respondent(s) and additional Respondents.
- E. Waive, at its discretion, any procedural, non-material defects, irregularity, or informality, which County deems correctable or otherwise not warranting rejection of the response that do not result in any unfair competitive advantage. Any waiver will not excuse a proponent from full compliance.

- F. Verify and validate any information prior to Contract Award and during the entire term of the Contract.
- G. Negotiate the final Contract with any Respondent(s), including pricing/fee schedule, as necessary to serve the best interests of the County.
- H. Withdraw or cancel in part or in its entirety this solicitation at any time without prior notice and furthermore makes no representations that any Contract will be awarded to any Respondent responding to this solicitation.
- I. Award its total requirements to one Respondent or to apportion those requirements among two or more Respondents as the County may deem to be in its best interests.
- J. Reject any response if it is conditional, incomplete or deviates significantly from the services requested in this solicitation.
- K. Request Best and Final Offer from any Respondent determined to be within the competitive range. Unless requested by the County, late Best and Final Offers will not be accepted by the County for any reason. In addition, negotiations may or may not be conducted with Respondents.
- L. Make multiple awards to Respondent(s) for services requested in this solicitation, at its sole discretion, to serve the best interests of the County.
- M. Defer award of this Contract for a period of 180 days after the solicitation opening. During this period, Respondent shall guarantee the prices and terms quoted in their responses. The County and the responsive, responsible Respondent may mutually agree in writing to extend this deferral period.
- N. Terminate negotiations with the selected Respondent and begin negotiations with the next Respondent, if a satisfactory contract cannot be negotiated in a timely manner.
- O. Negotiate and award a contract to the next highest scored Respondent if the awarded Respondent fails to perform.
- P. Based upon the County's needs or availability of funding at the time of selection of a contractor or during contract negotiations, to modify the scope of services and contract budget amount. In addition, negotiations may or may not be conducted with Respondents.

Therefore, responses submitted shall contain the Respondent's most favorable terms and conditions, since the selection and award may be made without discussion with any Respondent.

1.8 TITLE VI SOLICITATION NOTICE

The County of Orange, in accordance with the provisions of the Title VI of the Civil Rights Act of 1964 (78 Stat. 252, 42 USC §§ 2000d to 2000d-4) and the Regulations, hereby notifies all Respondents that it will affirmatively ensure that any contract entered into pursuant to this

advertisement, will be afforded full and fair opportunity to submit response to this solicitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

1.9 DEPARTMENT OF THE TREASURY, INTERNAL REVENUE SERVICE FORM W-9/W-8 REQUIREMENTS

Effective June 3, 2006, all Contractors, entering into a Contract with County, who are not already established in Countywide ERP System as an Auditor-Controller vendor, will be required to submit to County a federal Form W-9, or form W-8 for foreign vendors. County will inform Contractor, at the time of award, if the Form W-9 or W-8 will be required.

In order to comply with this County requirement, within 10 days of notification of selection of award of Contract but prior to official award of Contract, the selected Contractor agrees to furnish to Contract administrator, or the DPA, the required W-9 or W-8.

1.10 LEVINE ACT REQUIREMENT

Effective January 1, 2023, all contractors entering into a contract with the County, will be required to submit the Campaign Contribution Disclosure Form for any contributions made on or after January 1, 2023. In order to comply with this requirement, Respondent agrees to furnish the required Campaign Contribution Disclosure Form as a required submittal with its response. Failure to include the form as required will render the response nonresponsive.

1.11 ELIGIBILITY TO SUBMIT PROPOSALS

Eligible Respondents

Only legal entities located within Orange County with the ability to provide direct services in accordance with the scope of work detailed in this RFP are eligible to submit a proposal.

Ineligible Respondents

Individuals, governments, and organizations/agencies not listed as Eligible Respondents above or listed on either the Cumulative Sanction List or the excluded parties list, explained below, are ineligible to submit a proposal.

Respondents must not be listed on the current Cumulative Sanction List of the U.S. Department of Health and Human Services/Office of the Inspector General (<http://exclusions.oig.hhs.gov/>) or the System for Award Management (SAM)'s list of parties excluded from federal programs (<http://www.sam.gov/>). The County is required to reject a proposal submitted by an individual or entity on either list.

It will be the responsibility of each Respondent to verify that it is not on either list prior to preparing a proposal to submit in response to this RFP. Correction of any errors found on either sanction list is the sole responsibility of the Respondent and must be made prior to the day the proposal is submitted.

All potential individuals and/or contract entities must self-disclose any pending charges or convictions for violation of criminal law and/or any sanction or disciplinary action by any federal or state law enforcement, regulatory, or licensing agency or licensing body.

During the term of a contract resulting from this RFP and in accordance with its existing provisions, if a Respondent becomes ineligible, the Respondent will be removed from any responsibility and/or involvement with County contracted obligations related to any direct and/or indirect federal or State social services programs and any other federal and State funds. Ineligible Respondent is defined as any individual or entity who is currently excluded, suspended, debarred, or otherwise ineligible to participate in the federal social services programs, or has been convicted of a criminal offense related to the provision of social services and has not been reinstated in the federal social services programs after a period of exclusion, suspension, debarment, or ineligibility.

Disqualification

The County reserves the right to disqualify any Respondent on the basis of any real or apparent conflict of interest that is disclosed by the proposal submitted or any other data available to the County. This disqualification is at the sole discretion of the County. Any Respondent submitting a proposal herein waives any right to object to the County's exercise of this right, now or at any future time, before any body or agency, including, but not limited to, the County of Orange Board of Supervisors or any court.

Causes for Disqualification

The County, at its sole, absolute, and unfettered discretion, will determine whether a Respondent is qualified and responsible to deliver the services requested in this RFP. This determination may be based on one (1) or more of the following:

- A. Evidence of collusion amongst Respondents.
- B. Lack of business skills or financial resources necessary to operate this business successfully, as revealed by either financial statements or experience statement.
- C. Lack of responsibility as shown by past work, references, or other factors.
- D. Respondent is in arrears or in default to the County on any debt or agreement or defaults upon any obligation to the County or has failed to faithfully perform any previous agreement with County at the County's sole determination.
- E. Submission of a proposal that is late, conditional, incomplete, ambiguous, obscure or which contains alterations not called for, or irregularities of any kind, except as those determined by the County, at its sole discretion, as a minor irregularity or a defect or variation in the proposal that is immaterial or inconsequential.
- F. Other causes, as the County deems appropriate, at its sole and absolute discretion.

The County's determination as to whether a Respondent is qualified and responsible will be based on the information furnished by Respondent in response to this RFP, interviews with Respondent (if applicable), as well as from other sources determined to be valid by the County. The County reserves the right to verify and validate any information prior to awarding a contract and during the entire term of the contract. Award will not be made until after such investigations, as are deemed necessary, are made by the County regarding the experience and financial responsibility of Respondent which each Respondent agrees to permit by submitting its proposal.

1.12 ANTICIPATED TERM AND FUNDING AVAILABILITY

Contingent upon approval by the Orange County Board of Supervisors, the County intends to award one three-year contract to the responsible Respondent whose proposal is determined to be the most responsive to the requirements of this RFP. The term of the resulting contract will begin on or about July 1, 2027, and terminate on June 30, 2030. The estimated amount available for each year of the three-year contract will be \$700,000 per year for an estimated maximum of \$2,100,000 for all three years.

The initial three-year agreement may be renewed, subject to contractor performance and continued funding, for a two-year term, without a competitive bid process, at the sole discretion of the County.

The County reserves the right to award a one-year contract through this RFP, which may be renegotiated and/or renewed, subject to contractor performance and continued funding, for a two-year term without a competitive bid process, at the sole discretion of the County. In the event of a one-year contract award, the estimated amount available for the first year is \$700,000, and the estimated amount available for each additional one-year term is \$700,000. The amount allocated to this RFP is approximate and tentative at this time.

The funding for the contract resulting from this RFP is contingent upon the County budget and inclusion of sufficient funding for the services hereunder in the budget approved by the County's Board of Supervisors for each fiscal year covered by said contract. If such approval, funding, or appropriations are not forthcoming, or are otherwise limited, the contract may be immediately terminated, reduced, or modified without penalty.

SECTION 2. PROTEST PROCEDURES

Any actual or prospective bidder or respondent who alleges an error or impropriety in the solicitation or award of a contract may submit a grievance or protest to Jordyn Lett at jordyn.lett@ssa.ocgov.com, as set forth herein.

PROTEST PROCEDURES

All protests shall be typed under the protestor's letterhead and submitted in accordance with the provisions stated herein. All protests shall include at a minimum the following information:

- A. The name, address, and telephone number of the protestor;
- B. The signature of the protestor or the protestor's representative;
- C. The solicitation or contract number;
- D. A detailed statement of the legal and/or factual grounds for the protest; and,
- E. The form of relief requested.

Protest of Solicitation Specifications:

- A. All protests related to solicitation specifications must be submitted to the DPA, Jordyn Lett at jordyn.lett@ssa.ocgov.com, no later than five (5) business days prior to the Closing Date of the solicitation. Protests received after the five (5) business-day deadline will not be considered by the County.
- B. In the event the protest of specifications is denied, and the protestor wishes to continue in the solicitation process, the protestor must still submit a bid/response prior to the close of the solicitation in accordance with the solicitation submittal procedures provided in this solicitation.

Protest of Award of Contract:

- A. Protests related to the award of a contract must be submitted to the DPA, Jordyn Lett at jordyn.lett@ssa.ocgov.com, no later than five (5) business days after the Notice of Solicitation Results is provided by the DPA.
- B. Protests relating to a proposed contract award received after the five (5) business day deadline will not be considered by the County.
- C. If the five (5) business day period expires without the receipt of a protest, the department may move forward with the contract award or if necessary, file the item for approval by the Board of Supervisors.

Protest Process

- A. In the event of a timely protest, the County shall not proceed with the solicitation or award of the contract until the DPA issues a decision on the protest.
- B. Upon receipt of a timely protest, the DPA will, within ten (10) business days of receipt of the protest, issue a decision in writing which shall state the reasons for the actions taken.
- C. The County may, after providing written justification, make the determination that an immediate award of the contract is necessary to protect the substantial interests of the County. The award of a contract shall in no way compromise the protester's right to the protest procedures outlined herein.
- D. If the protestor disagrees with the decision of the DPA, the protestor may submit a written appeal to the County Procurement Officer requesting an appeal to the Procurement Appeals Board, in accordance with the process stated below.

APPEALS PROCESS

- A. If the protestor wishes to appeal the protest decision of the Deputy Procurement Agent, the protestor must submit, within three (3) business days from receipt of the Deputy Procurement Agent's decision, a written appeal to the Office of the County Procurement Officer.

Written appeals must be sent by mail to the address below with a courtesy copy by email;

County of Orange/County Executive Office

County Procurement Office

400 W. Civic Center Drive, 5th Floor

Santa Ana, CA 92701

Attn: County Procurement Officer CPOAppeals@ceo.oc.gov

- B. Within fifteen (15) business days, the County Procurement Officer will review all materials in connection with the appeal, assess the merits of the protest and provide a written determination that shall contain his or her decision on whether the appeal shall be forwarded to the Procurement Appeals Board.
- C. The decision of the County Procurement Officer on whether to allow the appeal to go forward will be final and there shall be no right to any administrative appeals of this decision.

SECTION 3. OCLSB AND DVBE PREFERENCE POLICIES CERTIFICATION REQUIREMENTS

County of Orange Local Small Business (OCLSB) Preference and Disabled Veteran Business Enterprise (DVBE) Preference Policies Certification Requirements

3.1 OCLSB:

Effective January 1, 2020, County of Orange Board of Supervisors adopted the OCLSB Preference policy. Implementation of the OCLSB Preference policy supports local businesses, the local economy and the development of the County's tax base.

To be certified as a Local Small Business by the County of Orange, a business shall meet (1) and (2) below:

A. Local Business Requirements:

1. Maintains their principal center of operations (i.e. headquarters) within Orange County, and;
2. Has:
 - a. A business address located in the County of Orange that is not a post office box, or
 - b. A valid business license or certificate of occupancy issued by the County of Orange or by an Orange County city, or other documentation acceptable to the County of Orange.

B. Small Business Requirements:

1. Must be certified as a Small Business by the [State of California Department of General Services \(DGS\)](#); and,

C. Above requirements must be valid at the time of proposal submittal through the time of award of the contract. The terms and conditions of the contract shall additionally require the contractor to remain in compliance with the Local Business requirements (pursuant to subsection (a) above) through the term of the contract, including any extensions or renewals, and shall provide that contractor's failure to comply may be construed by County as a material breach of the contract.

3.2 DVBE:

Effective January 1, 2021, County of Orange Board of Supervisors adopted the DVBE Preference policy. The DVBE Preference policy supports local business opportunity, economy and the development of County's tax base, and in addition recognizes the service and sacrifice given by the men and women of our Armed Forces.

To be certified as a Disabled Veteran Business Enterprise by the County of Orange, a business shall meet (A) and (B) below:

- A. Must be certified as a DVBE by the [State of California Department of General Services \(DGS\)](#); and,
- B. DGS DVBE requirements must be valid at the time of bid/proposal submittal through the time of award of the contract. The terms and conditions of the contract shall additionally require the contractor to remain in compliance with the DVBE requirements (pursuant to subsection (a) above) through the term of the contract, including any extensions or renewals, and shall provide that the contractor's failure to comply may be construed by the County as a material breach of the contract.

To participate as an OCLSB and/or DVBE please read and follow the process outlined in **COUNTY OF ORANGE LOCAL SMALL BUSINESS (OCLSB) AND DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) CERTIFICATION REQUIREMENTS** in the VENDOR RESPONSES.

***NOTE: DVBE PREFERENCE IS NOT APPLICABLE TO PUBLIC WORKS OR A-E CONSTRUCTION PROJECTS.**

3.3 OCLSB/DVBE CERTIFICATION REQUIREMENTS:

County Of Orange Local Small Business (OCLSB) Preference And Disabled Veteran Business Enterprise (DVBE) Certification Requirements

- A. To participate as an OCLSB and/or DVBE the following requirements must be met:
 - 1. Must be certified with [State of California the Department of General Services \(DGS\) as a Small Business](#).
 - 2. Must be certified with DGS as an OCLSB and/or DVBE.
 - 3. Maintains their principal center of operations (i.e. headquarters) within Orange County.
 - 4. Certification must be valid at the date/time solicitation is closed, and it shall remain in effect at the time of contract award and through the term of the contract. County reserves the right to verify and/or reject incomplete documents.
 - 5. Complete and sign the Affirmation form attached herein. The signed Affirmation form and the OCLSB Certificate are required and must be returned with the solicitation response. Verify with County: Once a firm becomes certified by the DGS as a small business, the firm shall access the County's [OCLSB verification portal](#) to search for their company legal name in the OCLSB verification database.
- B. OCLSB or DVBE Preference provides for the following:

1. Invitation for Bid – IFB

A five percent (5%) deduction in the original bid price shall be applied to all confirmed OCLSB or DVBE bidders for evaluation purposes. If the lowest bidder is a certified OCLSB or DVBE bidder, the contract will be awarded at the certified OCLSB or DVBE's original bid price. The maximum allowable preference deduction is \$100,000.

2. Request for Proposal - RFP

- a. No Cost - Any Request for Proposals that does not include cost as a scoring criteria shall instead apply the five percent (5%) or eight percent (8%) preference percentage pursuant to the eligibility requirements above to a scoring criteria in the RFP that makes up no more than twenty percent (20%) of the total RFP.
- b. With Cost - An additional five percent (5%) shall be applied to the total cost of each certified OCLSB or DVBE to obtain their final score. If the final score of any OCLSB or DVBE matches the final score of a respondent who is not an OCLSB or DVBE, preference shall be given to the certified OCLSB or DVBE. If two or more OCLSBs and/or DVBEs have the same final score, the County shall determine the contract award based on the County's best interests.
Notwithstanding these preference procedures, the Orange County Board of Supervisors reserves the right to award contracts in any other permissible manner in consideration of the County's best interests.

C. Dual OCLSB and DVBE Preference provides for the following:

1. Business Certified as OCLSB and DVBE

If a State-certified OCLSB is also a State-certified DVBE, the preference given to that business shall be 8% instead of 5%.

D. Subcontractors

If bidder is submitting subcontractors to qualify for the OCLSB or DVBE preference, bidder must demonstrate through the Staffing Plan that 20% of the total bid amount is allocated to the OCLSB and/or DVBE subcontractor(s).

***NOTE: DVBE PREFERENCE IS NOT APPLICABLE TO PUBLIC WORKS OR A-E CONSTRUCTION PROJECTS.**

SECTION 4. PROPOSAL SCORING CRITERIA

4.1 PHASE 1

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Form A - Organization Experience	Points Based	300 <i>(33.3% of Total)</i>
2.	Form B - Services to be Provided	Points Based	475 <i>(52.8% of Total)</i>
3.	Form C - Staffing Plan	Points Based	100 <i>(11.1% of Total)</i>
4.	Compliance with the County Model Contract *Note: Respondents submitting exceptions to the County Model Contract of this RFP, will receive a score of “0” for this criterion.	Points Based	25 <i>(2.8% of Total)</i>

4.2 PHASE 2

No.	Evaluation Criteria	Scoring Method	Weight (Points)
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1.	Presentation/Interview Scoring Format: 100 points maximum: County reserves the right to conduct, or to not conduct, oral interviews and/or presentations with the highest-scored Respondent(s). The decision whether to conduct oral interviews/presentations rests solely with County and the decision of the DPA is final. Respondents shall be ready to attend the in-person interview within five (5) calendar days of notification. Any inquiry to determine the responsibility of a Respondent to this RFP may be conducted. Respondent agrees that the submission of a Proposal is permission by Respondent for County to verify all information contained therein. If County believes it necessary, additional information may be requested from Respondent. The County may also send written questions and ask for written responses within five (5) business days. Failure to comply with any such request may disqualify a Respondent from further consideration. Respondents must be prepared to discuss all aspects of their proposal in detail, including technical questions. Respondents will not be allowed to alter or amend their Proposal through the use of the presentation process.	Points Based	100 (100% of Total)
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SECTION 5. DESCRIPTION OF SERVICES and SCOPE OF WORK

5.1 BACKGROUND

The County of Orange (County) Social Services Agency (SSA) is currently requesting proposals to provide SSI, SSP, RSDI and SSDI Client Advocacy Services. The purpose of this program/service is to assist potentially eligible clients with the application process for SSI, SSP, RSDI and SSDI benefits. The Proponent may be required to act as the client's representative or obtain representation for clients for the Social Security Administration application, hearing, and appeals process.

The County of Orange SSA Assistance Programs (AP) Division administers the General Relief (GR) program. This program provides assistance to eligible adults who are ineligible to other federal or state cash assistance programs.

The GR Program is delegated to the County Board of Supervisors by State law and each county is required to establish standards of assistance which shall be available to the general public. The GR Program is a residual relief program for those persons who are ineligible for aid under any federal or State program which is designed to meet all of the client's needs. The objective of the GR Program is to develop a plan of support or rehabilitation for qualified clients so that GR will be utilized as a temporary emergency means of support while recipients strive to become self-

sufficient or to otherwise become independent of further assistance. All able GR applicants and recipients must participate in eliminating barriers to employment to enable them to become self-sufficient and must be evaluated for employability. All persons who are considered to be permanently disabled or are potentially eligible for SSI/SSP and SSDI benefits shall be referred to file an application for federal assistance as a condition of eligibility to receive GR.

SSA operates the Children and Family Services (CFS) Division, the County’s child welfare authority responsible for protecting children from abuse, neglect, exploitation, and unsafe living conditions. CFS provides a full continuum of services—including Emergency Response, Dependency Investigations, Family Maintenance, Family Reunification, Permanency Planning, Transitional Services for Non-Minor Dependents (NMDs), and specialized programs serving youth with complex medical, behavioral, developmental, or mental health needs.

CFS serves children from birth through age 17, as well as NMDs up to age 21, who may be involved with the Juvenile Court or receiving child welfare interventions. Many children and youth served by CFS experience significant challenges such as physical or emotional abuse, neglect, developmental delays, serious mental health conditions, substance abuse exposure, trauma histories, educational barriers or disabilities that may qualify them for federal benefits.

Through its comprehensive service network, CFS works to ensure that children live in safe, nurturing, and permanent homes, and that families receive the support needed to achieve stability, resilience, and long-term self-sufficiency. CFS identifies children and NMDs who may qualify for SSI, SSP or RSDI.

5.2 DEMOGRAPHICS

From July 1, 2024, through June 30, 2025, an average of 2,591 and from July 1, 2025, through June 30, 2026, an average of 2,288 approved GR clients were deemed unemployable due to incapacity or mental illness and requested an exemption or partial exemption from participating in the GR Work Program.

	Total Unemployable	
Month	2024-2025	2025-2026
July	2,582	2,597
August	2,606	2,552
September	2,575	2,475
October	2,624	2,434
November	2,583	2,350
December	2,580	2,310

January	2,552	2,263
February	2,528	2,197
March	2,579	2,148
April	2,589	2,074
May	2,662	2,039
June	2,626	2,019
Average	2,591	2,288

In FY 2024-25, SSA sent 345 referrals to our Social Security Advocate for processing and 409 referrals in FY 2025-26.

	<u>FY 24-25</u>		<u>FY 25-26</u>	
	Number of Referrals	Applications Submitted	Number of Referrals	Applications Submitted
General Relief	345	178	409	172

There were an average of 3,207 child welfare dependents from July 1, 2024, through June 30, 2025, and 3,047 from July 1, 2025, through June 30, 2026.

	Total Child Welfare Dependents	
Month	2024-2025	2025-2026
July	3,275	3,191
August	3,218	3,147
September	3,228	3,121
October	3,251	3,161
November	3,182	3,071
December	3,184	3,063
January	3,187	3,032
February	3,167	2,992
March	3,221	2,980

April	3,201	2,961
May	3,187	2,937
June	3,185	2,913
Average	3,207	3,047

In FY 2024-25, CFS received 93 referrals for review and 63 referrals in FY 2025-26.

	<u>FY 24-25</u>		<u>FY 25-26</u>	
	Number of Referrals	Applications Submitted	Number of Referrals	Applications Submitted
SSI & RSDI	93	46	63	26

5.3 HOMELESS SERVICE SYSTEM PILLARS

Social Services Agency supports the County's effort to build a responsive System of Care that meets the needs of individuals and families experiencing homelessness by providing access to permanent housing and supportive services.

The Scope of Work and services outlined are in alignment with the Outreach and Supportive Services Pillar and Housing Pillar from the Commission to End Homelessness Homeless Service System Pillars Report. Social Services Agency and Respondents shall work to implement the principles and commitments of the Outreach and Supportive Services Pillar and the Housing Pillar, as applicable.

Respondent shall upload their completed Homeless Service System Pillars Attestation in the Vendor Responses question.

5.4 SCOPE OF WORK

See Attachment A of Model Contract for Scope of Work.

SECTION 6. VENDOR RESPONSES

Proposals must be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content with sufficient detail to allow for accurate evaluation and analysis.

Proposals must be electronically organized into three (3) Parts and must be indexed in the order outlined below. List questions and your responses and/or attachments as numbered and listed within each part.

Part 1 - Compliance Statements

Part 2 - Company Profile & References

Part 3 - Respondent's Proposal

6.1 PART 1: COMPLIANCE STATEMENTS

Some *required questions might not be applicable to your company. Do not leave any required fields blank. Please indicate "N/A" when necessary. A required field that is left blank will prohibit your response from being submitted.

*indicates that it is required.

6.1.1 Validity of Response*

The County requires that all responses be valid for at least three hundred sixty-five (365) calendar days. Submissions not valid for at least 365 days will be considered nonresponsive. The Respondent shall state the length of time for which the submitted response shall remain valid below:

Please state 365 calendar days if your response will be valid for that period of time. If your response will be valid for a different period of time, please list the appropriate number of calendar days.

Maximum response length: 100 characters

*Response required

6.1.2 Certification of Understanding*

The County assumes no responsibility for any understanding or representation made by any of its officers, employees or agents during or prior to the execution of any Contract resulting from this solicitation unless:

- A. Such understanding or representations are expressly stated in the Contract; and
- B. The Contract expressly provides that the County therefore assumes the responsibility.

Representations made but not expressly stated and for which liability is not expressly assumed by the County in the Contract shall be deemed only for the information of the Respondent.

Respondent certifies that such understanding has been considered in this response.

☐ Please confirm

*Response required

6.1.3 Minimum Qualifications/Requirements Statement*

The Respondent certifies that it has thoroughly examined the County's requirements and meets all minimum qualifications and requirements set forth in this RFP.

☐ Please confirm

*Response required

6.1.4 Certificate of Insurance Coverage Requirements*

The Respondent shall certify its willingness and ability to provide the required insurance coverage and certificates as set forth in the Model Contract.

☐ Please confirm

*Response required

6.1.5 Certificate of Insurance*

Attach evidence your organization has or can obtain all required insurance.

*Response required

6.1.6 Department of the Treasury, Internal Revenue Service Form W-9 Requirements

All Contractors will be required to submit to County a federal Form W-9, or form W-8 for foreign vendors. County will inform Contractor, at the time of award, if the Form W-9 or W-8 will be required.

In order to comply with this County requirement, within ten (10) days of notification of selection of award of Contract but prior to official award of Contract, the selected Contractor agrees to furnish to the agency Deputy Procurement Agent (DPA) the required W-9 or W-8.

You may upload the appropriate form here or comply within the ten (10) days as described above.

6.1.7 Conflict of Interest*

Does the Respondent have an existing relationship with the County, past or current, for any financial or business reasons, or any other reason?

An answer of "NO" shall be considered as Respondent certifying that no relationship exists or has existed as outlined below. An answer of "YES" will allow you to disclose the necessary information to the County.

Respondent with an existing or past relationship with the County, for any reason, shall answer "YES" to this question and disclose:

- A. Any financial, business or other relationship with the County, any other entity that the County Board of Supervisors governs, or any County Board member, officer or employee,

which may have an impact, affect or influence on the outcome of the services you propose to provide. Provide a list of current clients, employees, principals or shareholders (including family members) who may have a financial interest in the outcome of services you propose to provide.

- B. Any financial, business or other relationship within the last three (3) years with any firm or member of any firm who may have a financial interest in the outcome of the work.

☐ Yes

☐ No

*Response required

When equals "Yes"

6.1.8 Conflict of Interest Follow Up Question 1*

Disclose any financial, business or other relationship with the County, any other entity that the County Board of Supervisors governs, or any County Board member, officer or employee, which may have an impact, affect or influence on the outcome of the services you propose to provide. Provide a list of current clients, employees, principals or shareholders (including family members) who may have a financial interest in the outcome of services you propose to provide.

*Response required

When equals "Yes"

6.1.9 Conflict of Interest Follow Up Question 2*

Disclose any financial, business or other relationship within the last three (3) years with any firm or member of any firm who may have a financial interest in the outcome of the work.

*Response required

6.1.10 Statement of Compliance*

A statement of compliance with all parts of this RFP or a listing of exceptions and suggested changes must be submitted in response to this RFP.

- Yes = No Exceptions: This response is in strict compliance with said RFP, including, but not limited to, the terms and conditions set forth in the Contract and its Attachments, and **no exceptions thereto are proposed.**
- No = Exceptions: If there are any proposed exceptions, this response shall proceed to upload a list of any and all exceptions in accordance with the instructions provided after "No" is selected.

Note: Respondents submitting exceptions to the County Model Contract listed in this RFP will receive a score of "0" for that criteria.

- ☐ Yes
☐ No

*Response required

When equals "No"

6.1.11 Attachment for each proposed exception must include:*

- A. The complete provision Respondent is taking exception to;
- B. The Respondent's suggested rewording (with tracked changes);
- C. Reason(s) for submitting the proposed exception (provide in the Model Contract section utilizing the "Comments" option); and
- D. Any impact the proposed exception may have on cost, scheduling, or other areas (provide in the Model Contract section utilizing the "Comments" option).

*Response required

6.1.12 Non-Collusion Affidavit*

Each Respondent must execute the Non-Collusion Declaration contained in the solicitation and submit it with the response.

The County of Orange may require that the Respondent, before awarding any subcontract, secure Non-Collusion Declarations from proposed Subcontractors. The County of Orange does not conduct business with Respondents who engage in the act of Collusion.

- [Non-Collusion_Declaration.pdf](#)

*Response required

6.1.13 Non-Collusion Declaration - A*

Has your firm ever initiated discussions with competing consulting firms about the payment structure of an existing or potential future contract with the County of Orange?

If Respondent selects a "Yes" answer, Respondent must provide a brief explanation below.

A "Yes" answer may preclude you from moving forward in the solicitation process.

- ☐ Yes
☐ No

*Response required

When equals "Yes"

6.1.14 Reason for Collusion:*

*Response required

6.1.15 Non-Collusion Declaration - B*

Has your firm participated in any discussions with competing firms in an effort to influence the payment structure for existing or potential County contracts?

Respondent must select one (1). A “Yes” answer may preclude you from moving forward in the solicitation process.

☐ Yes

☐ No

*Response required

When equals "Yes"

6.1.16 Provide names of competing firms: *

*Response required

6.1.17 Litigation against County of Orange in the past seven (7) years*

Respondent must certify either Yes or No:

A. (Yes) Respondent certifies current/past litigation as follows:

1. Respondent shall provide detailed information regarding litigation (court and case number), liens, or claims involving Respondent, or any company that holds a controlling interest in Respondent, against County of Orange in the past seven (7) years.

B. (No) Respondent certifies that Respondent or any proposed subcontractors do not have any past or current litigation described above.

☐ Yes

☐ No

*Response required

When equals "Yes"

6.1.18 Respondent shall provide detailed information regarding litigation (court and case number), liens, or claims involving any proposed subcontractors, or any company that holds a controlling interest in subcontractor firm(s), against County of Orange in the past seven (7) years.*

*Response required

6.1.19 Certification Regarding Debarment

Please download the below documents, complete, and upload.

- [CERTIFICATION REGARDING DEB...](#)

6.1.20 Name/Ownership Changes*

Respondent must certify either Yes or No below:

A. **(Yes)** Respondent certifies past company name changes and/or ownership changes, for Respondent's firm and any proposed subcontractor firm, as follows:

1. Respondent shall provide detailed information regarding any company name changes (including legal business names) in the past seven (7) years.

B. **(No)** Respondent certifies that Respondent or any proposed subcontractors have not had any company name change or ownership changes in the past seven (7) years.

☐ Yes

☐ No

*Response required

When equals "Yes"

6.1.21 Respondent shall provide detailed information regarding any company ownership changes (including legal business names) in the past seven (7) years. *

*Response required

6.1.22 The Levine Act: County of Orange Campaign Contribution Disclosure*

The Levine Act compliance is a minimum submittal requirement of this solicitation.

Please complete and sign the County of Orange Campaign Contribution Disclosure Form attached hereto. A proposer's failure to provide a completed and signed copy will render its proposal as incomplete and nonresponsive.

It is the supplier's responsibility to update the County should any new reportable activity occur between initial disclosure and award.

- [Levine Act - Campaign Contr...](#)

*Response required

6.1.23 Political Reform Act Confirmation (Statement of Economic Interest - Form 700)*

Check the box to confirm - If subject to the Political Reform Act, Respondent shall conform to all requirements of the Act.

Failure to do so shall constitute a material breach and is grounds for immediate termination of the Contract by County. Respondent shall indemnify and hold harmless County for any and all claims for damages resulting from Respondent's violation of this Section.

☐ Please confirm

*Response required

6.1.24 Preference Policy - OCLSB/DVBE*

Orange County Local Small Business (OCLSB) or a Disabled Veteran Business Enterprise (DVBE)

To participate as an OCLSB and/or DVBE, the requirements in the [OCLSB AND DVBE PREFERENCE POLICIES CERTIFICATION REQUIREMENTS](#) must be met.

☐ Yes

☐ No

*Response required

When equals "Yes"

6.1.25 OC Local Small Business (OCLSB) Preference And Disabled Veteran Business Enterprise (DVBE) Certifications*

Instructions are located here: <https://cpo.ocgov.com/doing-business-oc/preference-policies>

- [Local Small Business \(OCLSB...](#)

*Response required

6.1.26 Contract Signatures*

Upon recommendation of contract award, Respondent will be required to submit the Signed Contract within ten (10) days of County notification, unless otherwise specified in the RFP.

Selected Respondent will be required to sign a contract upon award. If selected Respondent is a corporation, signature will be provided in accordance with the corporation's code as specified in this solicitation.

☐ Please confirm

*Response required

6.1.27 I HAVE READ, UNDERSTOOD AND AGREE TO ALL STATEMENTS IN THIS REQUEST FOR PROPOSAL, AND TO THE TERMS, CONDITIONS AND ATTACHMENTS REFERENCED HEREIN*

☐ Please confirm

*Response required

6.2 PART 2: COMPANY PROFILE & REFERENCES

Some *required questions might not be applicable to your company. Do not leave any required fields blank. Please indicate "N/A" when necessary. A required field that is left blank will prohibit your response from being submitted.

*indicates that it is required.

6.2.1 Company Legal Name:*

As shown on IRS W-9 Form.

*Response required

6.2.2 Company Legal Status (corporation, partnership, etc.):*

*Response required

6.2.3 Unique Entity Identifier Number (UEI):*

The County requires a valid UEI number with active registration status. Your company may obtain one at no cost at <https://sam.gov/entity-registration>.

*Response required

6.2.4 SAM.gov Confirmation:*

Please upload a printout from SAM.gov to confirm that your company currently has no active exclusions. The printout must be no greater than seven (7) calendar days prior to the due date of this bid.

*Response required

6.2.5 California Secretary of State registration - active and in good standing:*

Please upload your active certificate from the California Secretary of State. If a Sole Proprietor - upload a document stating "Not applicable as a Sole Proprietor".

CA Sec. of State Verification Link = <https://bizfileonline.sos.ca.gov/search/business>

*Response required

6.2.6 D-U-N-S Number:*

Please provide your company's DUNS number.

The County requires a valid D-U-N-S number prior to Contract Award. If needed, your company may obtain one at no cost at www.dnb.com. If you are unable to provide/obtain a D-U-N-S number, please indicate so in lieu of the number.

*Response required

6.2.7 Federal Taxpayer ID Number:*

*Response required

6.2.8 California Department of Justice, Office of Attorney General active registration:*

For Non-Profit and/or Charitable organizations, please provide your active (registration status is current). All others enter N/A.

- RCT Registration Number
- Renewal/Expiration Date

DOJ Verification Link - <https://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>

*Response required

6.2.9 DVBE Certification Number:*

To be certified as a Disabled Veteran Business Enterprise by the County of Orange, a business shall meet (1) and (2) below:

- A. Must be certified as a DVBE by the State of California Department of General Services (DGS); and,

B. DGS DVBE requirements must be valid at the time of bid/proposal submittal.

*Response required

6.2.10 SBA Certification Number:*

Enter certification number.

*Response required

6.2.11 Corporate Office Address:*

What is the address of the company's corporate office? Please provide the full street/ mailing address.

*Response required

6.2.12 Local Business Address(es):*

Please provide the local business address for the company named above. If there are multiple local addresses then please provide all.

*Response required

6.2.13 Telephone Number:*

*Response required

6.2.14 Fax Number:*

*Response required

6.2.15 Email Address:*

*Response required

6.2.16 Length of time Respondent has been in business:*

*Response required

6.2.17 Length of time at current location:*

*Response required

6.2.18 Is your firm a sole proprietorship doing business under a different name?*

☐ Yes

☐ No

*Response required

When equals "Yes"

6.2.19 If yes, please indicate sole proprietor's name and the name you are doing business under:*

*Response required

6.2.20 Is Respondent incorporated?*

☐ Yes

☐ No

*Response required

When equals "Yes"

6.2.21 If yes, State of Incorporation:*

*Response required

When equals "Yes"

6.2.22 Contract Signature Authority - Executive Signature*

If incorporated, please provide the name, contact number, and email of the person who would provide this signature authority. The Executive Signer Authority comes from the President, Vice-President, or Chairperson of the Board.

- Contact Full Name:
- Contact Number:
- E-mail Address:

*Response required

When equals "Yes"

6.2.23 Contract Signature Authority - Financial Signature*

If incorporated, please provide the name, contact number, and email of the person who would provide this signature authority. The Financial Signer Authority comes from the Secretary, Assistant Secretary, Chief Financial Officer, or Treasurer.

- Contact Full Name:
- Contact Number:
- E-mail Address:

*Response required

When equals "No"

6.2.24 Contract Signature Authority*

If not incorporated, please provide the name, contact number, and email of the person who has the binding and signature authority of this contract.

- Contact Full Name:
- Contact Title:
- Contact Number:
- E-mail Address:

*Response required

6.2.25 Regular business hours:*

*Response required

6.2.26 Regular holidays observed:*

*Response required

6.2.27 Contact person in reference to this RFP:*

Please include the following information in this response and note that this person is responsible for monitoring and responding to all communications for this solicitation:

- A. Contact Person Full Name:
- B. Telephone Number:
- C. Fax Number:
- D. Email Address:
- E. Mobile Number:

*Response required

6.2.28 Contact person for Accounts Payable:*

Please include the following information in this response:

- A. Contact Person Full Name:
- B. Telephone Number:
- C. Fax Number:
- D. Email Address:
- E. Mobile Number:

*Response required

6.2.29 Contact person for Project Manager:*

Please include the following information in this response:

- A. Contact Person Full Name:
- B. Telephone Number:
- C. Fax Number:
- D. Email Address:
- E. Mobile Number:

*Response required

6.2.30 Company Emergency Contact*

State the following for the emergency contact person in reference to this solicitation:

- Full Name (First and Last) of contact during non-business hours
- Telephone Number (including area code)
- Fax Number (including area code), if applicable
- Cell Phone Number (if different than regular phone)
- Full Email Address

*Response required

6.2.31 References*

Respondent must demonstrate successful prior performance of comparable services in the public sector arena and provide a minimum five (5) references with three (3) references from public sector entities and clients that are comparable to the County of Orange for which these types of services have been performed within the past five (5) years. **References cannot be from one of the County of Orange departments or from more than one of the same entity.**

Please provide letters of reference that include the following information for each of the five references:

- Company Name
- Contact Name
- Email
- Telephone number
- Address
- Contract Effective Dates
- Contract Amount
- Brief Contract Description

*Response required

6.3 PART 3: RESPONDENT'S RESPONSE

Some *required questions might not be applicable to your company. Do not leave any required fields blank. Please indicate "N/A" when necessary. A required field that is left blank will prohibit your response from being submitted.

6.3.1 Respondent's Proposal*

Please download the below documents, complete, and upload.

- [Forms A-C.docx](#)

*Response required

6.3.2 Respondent's Organizational Structure and Chart*

Please upload your organizational chart.

Organizational Structure, Including Organizational Chart: Respondent must provide information regarding existing and/or proposed local organizational structure within Orange County and, where applicable, outside Orange County. If Respondent's headquarters is located outside of Orange County, Respondent must define the relationship between the existing or proposed Orange County organization and the main headquarters. The chart must identify the relationship of the proposed services/program to the overall organization and identify the reporting relationship of each proposed staff position.

*Response required

6.3.3 Respondent's Articles of Incorporation*

Please upload your organization's Articles of Incorporation.

If your organization is incorporated, attach Articles of Incorporation (executed by the Secretary of State), Bylaws, and Amendments.

*Response required

6.3.4 Respondent's Signature Authorization Resolution*

Please upload your organization's Signature Authorization Resolution documentation.

If applicable, attach a board or corporate resolution, or other documentation, demonstrating the legal authority of the signatory to bind the organization.

*Response required

6.3.5 Does your organization currently hold a license to do business in California?*

☐ Yes

☐ No

*Response required

When equals "Yes"

6.3.6 As applicable, attach current business or professional licenses or certificates required by the nature of the contract work to be performed and held by the Respondent.*

*Response required

6.3.7 Respondent's Financial Statements*

Please upload your organization's Financial Statements.

Respondent (*excluding government agencies*) shall provide a complete financial statement based upon an audit that is not more than eighteen (18) months old from the proposal submission deadline, certified by an independent certified public accountant. These statements should clearly identify the financial condition of the Respondent's business entity as well as that of its corporate structure, if applicable. The financial statement will be used in determining the Respondent's financial condition, including the working capital position that would permit the Respondent to perform a contract of the size indicated by this RFP. All required financial statements must be prepared in conformity with Generally Accepted Accounting Principles (GAAP).

*Response required

6.3.8 Homeless Service System Pillars Attestation*

Please download the below document, complete, and upload.

- [1-RFP_Homeless_Service_Syst...](#)

*Response required