

Request for Proposal for

Helping Hands Benefits Application Assistance Program (RFP No. BAP 2024-26)

Alliance of Community Assistance Ministries, Inc. (ACAM received a contract award from Harris County (Contract No. HC230497) for Helping Hands Benefits Application Assistance Program. Accordingly, ACAM hereby solicits proposals from qualified organizations.

RFP TIMELINE

Official Release Date: Thursday, August 15, 2024
Full RFP posted at: https://acamweb.org/funding-vendor-opportunities/
Optional RFP Conference August 29, 2024, 10:00 am-11:00 am
Zoom registration link: https://us02web.zoom.us/meeting/register/tZwpfu-rrigtH9Oar_7UISzfQv7MGq10LcRW
RFP Questions Due by September 4, 2024, at 12PM CDT
Please submit questions in writing to Sarah Malcolm at smalcolm@acamweb.org
Anticipated Release Date of ACAM answers to written questions received: September 6, 2024, at 5:00 PM CDT
Proposals Due: September 10, 2024 at 12:00 PM CDT
Anticipated Preliminary Award Announcements: October 7, 2024
Internet website where addenda and answers to questions will be posted at https://acamweb.org/funding-vendor-opportunities/

Responses to this request for proposals should be emailed to:

ACAM Director of Resiliency Programs

Sarah Malcolm

Reportsandrequests@acamweb.org

The proposal cover sheet must be signed and dated by an authorized representative of the proposing organization

Late proposals will NOT be accepted. Proposals must be received by the due date and time.

If all or any portion of a response submitted is received late or is otherwise non-responsive due to equipment failure or operator error, the response or the applicable portion of the response will not be considered. In addition, ACAM is not liable for equipment failure or operator error.

Introduction

Alliance of Community Assistance Ministries, Inc. (“ACAM”) seeks qualified service providers to outreach to and provide culturally and linguistically capable one-on-one navigation services in community-based organizations that can leverage their on-the-ground knowledge to best meet the needs of Harris County residents. As such, all service providers will be expected to work in collaboration with one another and with ACAM, Harris County, Texas/United Way 2-1-1 Helpline, and the State of Texas Community Partner Program (CPP) throughout the term. Contractor service providers will share successes, challenges, emerging issues and best practices. Service providers will be expected to focus their services on those families who but for outreach and application assistance would likely not achieve successful submissions, resubmissions, or appeals for public benefits and related programs. ACAM found that the barriers to successful applications submissions included but were not limited to: 1) literacy skills (both English and digital), 2) availability of resources (time, technology, etc.), 3) necessary supporting documentation, 4) lack of understanding or misinformation related to eligibility, and 5) previous denial, current denial, or lost password access. ACAM will work with a cohort of organizations serving in the grass roots that currently provide assistance to families to navigate public benefits or currently provide other basic needs services and wish to add benefits application assistance to their menu of services.

Contracted service providers will:

1. Expand existing benefits access capacity to reach a larger number of Harris County residents and/or connect current clients to additional benefits;
2. Expand existing benefits access capacity to reach new/additional/different populations beyond those already well-served;
3. Expand existing benefits access capacity to include new benefits programs for which navigation services are not currently provided;
4. Develop new/additional capacity and new approaches focused on keeping Harris County residents currently served by the organization enrolled in benefits;

The objective of this RFP is to solicit proposals from qualified respondents in order to select service providers that will provide the best overall value to ACAM. While price is a factor, other criteria (including but not limited to past experience, capacity, estimated number of households to be served, and number of applications) will form the basis of the decision. ACAM reserves the right to amend, suspend, terminate, or reissue this RFP, in whole or in part, at any stage. In no event is ACAM liable to respondents for any cost or damages incurred in connection with the RFP process, including but not limited to, all costs of preparing a response to this RFP, or any other costs incurred in reliance on this RFP. No respondent shall be entitled to repayment from ACAM for any costs, expenses, or fees related to this RFP. All supporting documentation submitted in response to this RFP will become the property of ACAM. Respondents may also withdraw their proposal in writing at any point in time as more information becomes known.

I. RFP Summary

A. Statement of Qualifications

A qualified contracted service provider will possess experience at providing benefits application assistance or related navigation services and outreach as described in the Helping Hands Benefits Application Assistance Program (Herein BAP) Business Rules. Proposals must describe past clients, types of programs administered, and résumés and/or

position descriptions of all key staff (personal identification may be redacted from résumés) who might provide services if the contract is awarded.

B. Scope of Work

ACAM is a nonprofit organization that advances collaboration to create community-wide solutions for thriving nonprofits, neighborhoods, and families. BAP provides outreach and benefits application assistance to Harris County residents as described in *Section II*.

C. Proposed Cost of Services

Proposals must include an estimated cost for services described in the Scope of Work. While cost is a factor, ACAM will not use the lowest cost as the sole basis for selecting the best bid(s) for this contract.

II. Scope of Services

A. Background

Poverty is associated with increased risk for negative early childhood outcomes; however, considerable evidence exists documenting the positive impact safety net programs have on children's wellbeing and outcomes. Harris County has significant need with twenty-six percent (26%) of children living at or below the federal poverty guidelines and sixty-five percent (65%) of Harris County children living at or below 200% of federal poverty guidelines.

Despite the need for and positive impact associated with public safety net programs, Harris County has significant gaps in participation for available programs. As an example, some estimates find that 105,000 - 110,000 Harris County children are likely eligible but not enrolled for the Supplemental Nutrition Assistance Program (SNAP) and that 85,000 Harris County residents are eligible but not enrolled in Texas Medicaid or the Children's Health Insurance Program (CHIP). Other estimates find that nearly 500,000 Harris County residents are eligible for some type of benefit, but are not enrolled, and that there may be up to \$1 Billion in unclaimed benefits in the region. To increase participation in safety net and publicly funded safety-net programs, Harris County is contracting with the Alliance of Community Assistance Ministries, Inc. (herein "ACAM") to operate and administer a large-scale enrollment drive program in Harris County. Through the program, ACAM will coordinate BAP with the goal of enrolling eligible residents in public benefits programs. A secondary goal of the program is to increase the capacity of local organizations to continue to enroll Harris County residents after the term of the BAP contracts.

ACAM has \$2.25 million dollars to award up to ten (10) contracts with service providers to conduct outreach to Harris County residents in need of benefits application assistance and provide one-on-one assistance to apply for public benefits and assistance programs.

B. Expectations & Deliverables

The general expectations for contracted service providers are listed below. Service Providers are part of a learning cohort which can result in modifications to program implementation. Contracted service providers will:

1. Implement plan to achieve the targets for outputs and outcomes based on the plan presented in the response to the request for proposal and during contract negotiations.
2. Follow a workplan and schedule of activities
3. Conduct community outreach activities such as door-to-door information, community events, social media outreach etc...
4. Maintain benefits outreach and navigation staff at all times to ensure consistent program and community support. Maintain full-time Benefits Navigator(s) who are dedicated to the program 100% of their work time.
5. Maintain active status with the Community Partner Program and hold or actively seek to obtain Level III capability (<https://www.texascommunitypartnerprogram.com/>)
6. Participate in collaborative support model by:
 - a) Participate in one-on-one and group meetings to provide opportunities to increase knowledge about program service delivery and to address specific concerns.
 - b) Participate in Continuous Quality Improvement (CQI) meetings including but not limited to topic-specific training, program updates, cross-agency review of client navigation issues, networking, and resource sharing.
 - c) Accept ongoing technical assistance, on and off site, to address program questions, client concerns, procurement processes, and data/reporting issues.
 - d) Utilize the templates for contracted service providers to expedite program implementation, which may including job descriptions, outreach materials, referral partner MOUs, etc.
 - e) Deploy standardized protocols for client follow-up. This will be important to the ability to assess the project's progress and outcomes across various demographic groups and geographic locations within Harris County.
 - f) Complete timely and accurate monthly program performance reports (MPR)
 - g) Complete timely and accurate monthly expenditure reports (MER) including all necessary backup documentation required for reimbursement
 - h) Comply with the requirements of 2 CFR part 25 Universal Identifier and System for Award Management (SAM) by maintaining an active registration in SAM in accordance with 2 CFR part 25, appendix A, and having Unique Entity Identifier (UEI).
 - i) Retain sufficient records, which may include, but are not limited to financial records, supporting documents, statistical records, and all other records pertinent to the program in accordance with, 2 CFR Part 200 and any applicable guidance from the U.S. Department of the Treasury.
7. Organization will demonstrate a commitment to design programs in line with the Harris County Equity Framework see **EXHIBIT B**.

C. Program Components

- 1) The Helping Hands Benefits Application Assistance Program (BAP) is a family-centered benefits navigation program. Households shall receive one-on-one assistance to access benefits for the adults and children within each family. The intent of the program is to offer application assistance to a wide array of benefits including all those available through Texas Health and Human Services. In general, service providers will:

- i. Outreach – Conduct Targeted Outreach which includes planned and coordinated efforts to communicate information about a host of public benefits and financial assistance programs with an overall intent to increase awareness, participation, and enrollment in the program. This requires a marketing strategy that involves identifying, communicating with, and recording contacts with specific groups or individuals with those most in need of benefits and benefits application assistance. Respondent service providers will submit an outreach plan including General Outreach (e.g. social media, mailers, flyers etc.) and Targeted Outreach (sessions on-site or off-site, virtual or in-person, designed to provide information to likely eligible beneficiaries who are recorded as attending such sessions).
- ii. Assess eligibility (for the Helping Hands BAP) and conduct intake in accordance with ACAM procedures. Note that eligibility determinations for the public benefits are made by the proper government agency and not by the BAP navigators. For example, Texas Health and Human Services holds all authority to determine eligibility for the programs it administers.
- iii. Create a comprehensive benefits navigation plan that includes all potentially eligible members of the household.
- iv. Provide direct assistance to ensure household members receive assistance applying for benefits including but not limited to:
 1. County Financial Assistance Programs (FAP)
 2. Children’s Health Insurance Program (CHIP)
 3. Children’s Medicaid
 4. Children’s Health Insurance Program CHIP Perinatal
 5. Healthy Texas Women (HTW)
 6. Medicaid for Pregnant Women (MPW)
 7. Medicaid for Former Foster Care Children (FFCC)
 8. Medicaid for the Elderly and People with Disabilities (MEDP)
 9. Medicaid Adults
 10. Medicare Savings Plans (QMB)
 11. Supplemental Nutrition Assistance Program (SNAP)
 12. Temporary Assistance for Needy Families (TANF)
 13. Harris County Financial Assistance Program (FAP) (formerly Gold Card)
 14. Other – other assistance that may be provided but not required include benefits such as Supplemental Security Income (SSI), Housing (e.g. Housing Choice Voucher), utility assistance (e.g. CEAP), and unemployment insurance
- v. Ensure proper and full entry into the YourTexasBenefits.com portal including all required documentation
- vi. Follow up with families to determine if denied applications require re-submission or appeal
- vii. Provide advanced supportive navigation assistance through the Texas Health and Human Services Community Partner Program (CPP)
- viii. Provide one-on-one assistance with technical issues through the Texas United Way HELPLINE 2-1-1 option 2
- ix. Document the final determination on all applicable applications.

- x. Coordinate information and referrals for clients needing services in the community
- xi. Conduct client meetings in-person, over the phone, or virtually
- xii. Record individual and household program data
- xiii. Produce accurate and complete benefits navigation records

D. Program Tiers

ACAM is seeking organizations serving Harris County neighborhoods to outreach and assist families to access public benefits and financial assistance programs (e.g., Harris County Financial Assistance Program, FAP formally Gold Card). Respondents may apply to provide services at one of the three tiers described below. The tiers are based on current capacity to engage and assist clients with a variety of benefits applications allowing families to access as many potential benefits as possible through one navigation stream. Since Texas Health and Human Services determines the eligibility of a diverse set of public benefits, organizations that are engaged in the Community Partner Program (CPP) have a bridge between Texas Health and Human Services and the community-based organization serving clients in Harris County's neighborhoods. Although benefits application assistance will not be limited to those determined by Texas Health and Human Services, respondents must be or agree to pursue Level III CPP status. CPP provides access and training that is free to organizations. Level III community partners must meet all the requirements of Level I and II and have trained case assistance navigators which then allows organizations to provide a greater level of support to families through access to the search status function on <https://www.yourtexasbenefits.com>. For more information of the Community Partner Program visit <https://www.texascommunitypartnerprogram.com/>.

Respondents must select a tier and submit evidence that the organization has the current capacity to perform services at the chosen tier level. A response will be excluded if a tier is selected for which there is insufficient evidence of capacity as described below. In addition, failure to select a tier will be considered non-responsive to this RFP, and the response will not be reviewed. Respondents are not required to propose services at the maximum amount of each tier. For example, selecting Tier III (a level III CPP) may propose service at a cost from \$75,000 - \$350,000. ACAM seeks service providers where the activity supports the total cost (e.g., cost per application, cost per person, etc..). BAP is to enhance productivity of organizations that are already providing navigation assistance. The Tiers are for proposal purposes, and ACAM reserves the right to adjust contract amounts and performance indicators outside the described tier components (both award amounts and performance indicators) as a part of contract negotiations.

Tier I: respondents must demonstrate

- Current Level III Community Partner (CPP) status
- Currently have Texas Health and Human Services (HHS) trained navigation staff Level III
- Regularly conduct benefits application services, outreach, and follow-ups
- May propose up to \$350,000 in BAP services

Tier II: respondents must demonstrate

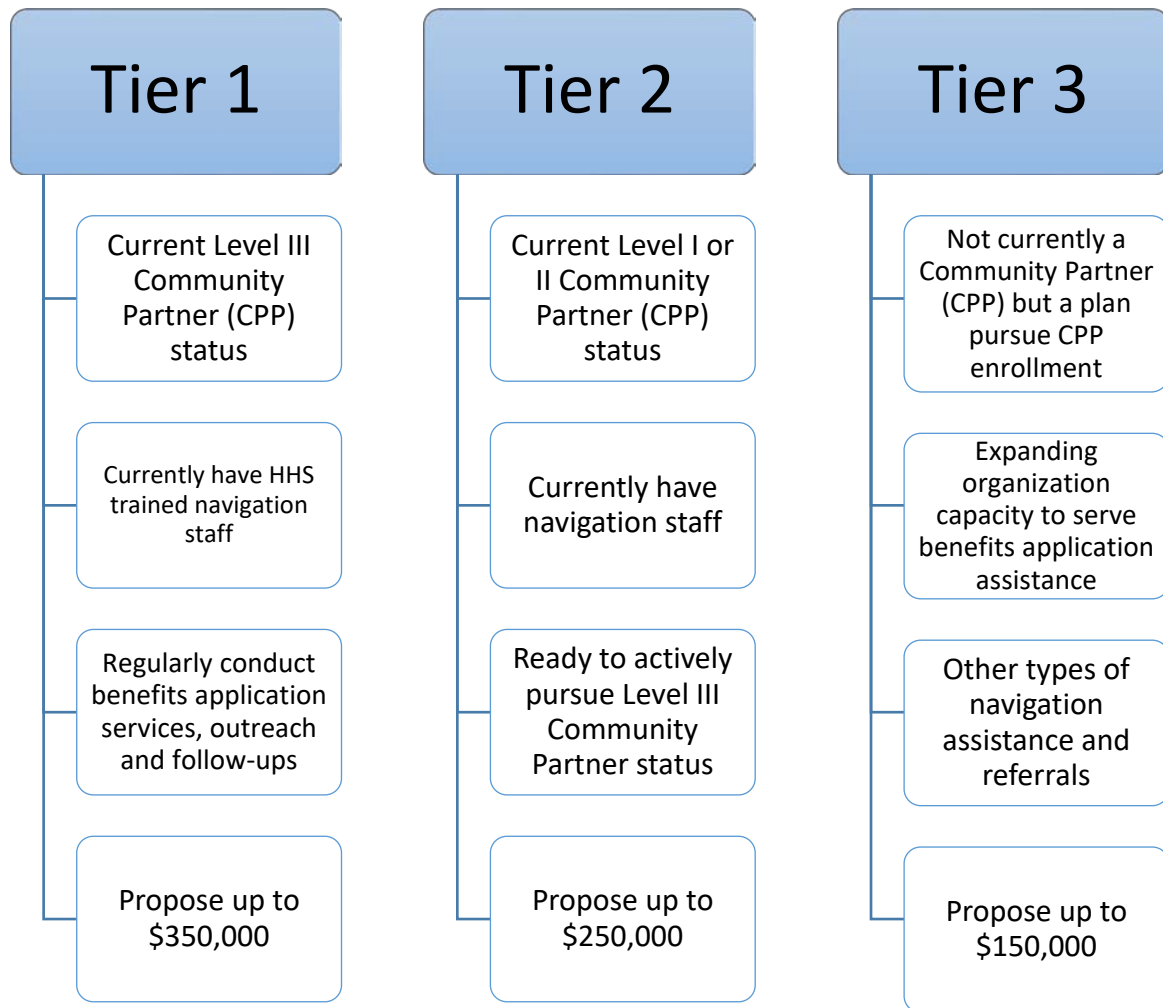
- Current Level I or II Community Partner (CPP) status

- Currently have navigation staff
- Ready to actively pursue Level III Community Partner (CPP) status
- May propose up to \$250,000 in BAP services

Tier III: respondents must demonstrate

- Not currently a Community Partner (CPP) but plan to pursue CPP enrollment
- Expanding organization capacity to provide benefits application assistance
- Other types of navigation assistance and referrals
- May propose up to \$150,000 in BAP services

Program Tiers



E. Measuring Impact

ACAM and its selected service providers will maintain data for the program which include but not limited to:

- 1) Household unique identification number
- 2) Individual unique identification number

- 3) Number of people and households provided with targeted outreach (the number of Targeted Outreach events, number of documented attendees at the outreach events, and number of households represented at the events)
- 4) Number of people and households assisted with benefits applications (this applies to every household member for whom a benefit application applies)
- 5) Number and type of benefit applications submitted that are new applications or renewal applications (new applications are defined as applications that have expired or have never before been approved for a particular individual)
- 6) Number and type of new applications that were approved and number and type of renewal applications approved based on evidence at follow up
- 7) Number and type of new applications that were denied and number and type of renewal applications denied based on evidence at follow up
- 8) Type and number of applications submitted with complete backup (see list in ***Section II(C)(iv)***),
- 9) Demographics including race and ethnicity
- 10) Age at date of program entry (to categorized in reports as infant <12 months old, toddler 1–5 years old, kids 5+–12 years old, teens 12+–18 years old, young adult 18+–25 years old, adult 25+–65 years old, older adult 65+–85 years old, elderly >85 years old)
- 11) Other special populations (disabilities – applies to both adult and children in the household who have a disability including mental illness, neurological difference or other diagnosed disability)
- 12) Household income
- 13) Number of households
- 14) Number of people and households by zip code
- 15) Household composition (number of adults, children, etc.)

Personally Identifying Information (PII) –contracted service providers will be required to collect information on the households and clients served. Agencies must have effective privacy procedures and systems that safeguard PII. ACAM will not be directly collecting PII as part of the monthly performance reporting. However, each service provider will be required to be able to produce necessary documentation and information for audit and monitoring purposes. The unique household and client IDs must be linked to records such that client records can be produced for review.

F. Eligible Uses of Funds

Funds can be used for outreach to eligible households and direct assistance in the application process for public benefits and related financial assistance programs. Direct assistance with basic needs is not an allowable use of funds under the Helping Hands Benefits Application Assistance Program. Organizations may dually enroll families in other programs that provide basic needs and other services so long as the cost for such services is covered under other programs. The following is a list of services for which ACAM has authorization to incur expenses.

- 1) Personnel – direct navigation staff time dedicated to outreach, direct benefits navigation assistance, client follow up, monthly reporting, participation in evaluation, benefits access training, and required meetings.
- 2) Payroll Taxes – payroll taxes related to the direct navigation staff proportionate to the amount of time spent on the program
- 3) Benefits – fringe benefits proportionate to the direct services staff time spent on this program
- 4) Supervision – a maximum of 20% of the direct supervisor’s time related to the supervision of the program
- 5) Supervisor Payroll Taxes - payroll taxes related to the supervision of direct navigation staff proportionate to the amount of time the supervisor(s) spent on the program
- 6) Supervision Benefits- fringe benefits proportionate to the amount of time the supervisor(s) spent on the program
- 7) Travel - mileage reimbursement for navigators and direct supervisors to required program training, meetings and to sites for client outreach and enrollment at the IRS mileage rate that are documented with the purpose and proof of mileage (e.g. odometer readings) and duly authorized by management.
- 8) Equipment – purchase or lease of equipment such as tablets or computers for direct service navigation staff. Organizations are responsible for ensuring compliance with the general procurement standards as detailed in 2 CFR 200.
- 9) Supplies – items used for the program with an acquisition cost less than the lesser of the capitalization level established for financial statement purposes or by the non-Federal entity, or \$5,000, regardless of the length of its useful life. Organizations are responsible for ensuring compliance with the general procurement standards as detailed in 2 CFR 200.
- 10) Other – Services needed for the program. Contracted service providers are responsible for ensuring compliance with the general procurement standards as detailed in 2 CFR 200.
- 11) Administration/Indirect – administration and overhead services needed for the program (maximum of 10% of direct program costs).

G. Start Date and Contract Term

The Alliance of Community Assistance Ministries, Inc. (ACAM) hereby requests proposals from offerors to perform Helping Hands Benefits Application Assistance Services as described in the RFP for a seventeen-month period expected to begin November 1, 2024, through March 31, 2026. Contracted service providers should be ready to commence work on November 1, 2024. We invite organizations to submit a proposal by Tuesday, September 10, 2024, by 12:00 pm, for consideration. Proposals will be held in confidence until after the contract(s) are awarded. Payments on contract(s) will be made on a reimbursement basis. The contract amount agreed upon by ACAM and the respective contractor(s) will provide compensation for services rendered - allowable direct and indirect expenses. A payment schedule will be negotiated with selected service provider(s). ACAM reserves the right to offer a contract award greater or less than the amount proposed.

BAP selected service providers will be selected on their ability to meet the expectations of the BAP and ensure compliance with the written guidance. BAP is designed and implemented by ACAM and follows all applicable federal regulations. Selected organizations shall be required

to follow ACAM's program guidance. Offerors will be selected on their ability to comply with federal and local regulatory expectations. Prior experience and performance will be taken into consideration. Offerors shall demonstrate financial and staffing capacity to perform the work proposed. ACAM will verify that any offeror selected is not restricted from participation in government contracts through <https://www.sam.gov> and through <https://ourepa.cpa.state.tx.us/coa/Index.html>. Debarred or suspended offerors from the State of Texas and/or Federal government shall not be procured.

III. CONTENT OF THE PROPOSAL

A. Scope of Services

To submit a proposal in response to the scope of services for this RFP, organizations must complete all components of the proposal including: the fillable response form (all sections), the completed signed and dated cover sheet, completed excel budget form and all required attachments. Documents should be submitted by email no later than 12pm on September 10, 2024 to Reportsandrequests@acamweb.org. If all or any portion of a response submitted is received late or is otherwise non-responsive due to equipment failure or operator error, the response or the applicable portion of the response will not be considered. In addition, ACAM is not liable for equipment failure or operator error. Incomplete applications and attachments may be considered non-responsive and may not be reviewed.

The following questions are provided below but should be completed in the fillable PDF form (BAP response form):

- 1) Offeror shall describe its firm's overall mission and vision and how that relates to the work outlined in this RFP.
- 2) Offeror shall describe the targeted service area including but not limited to zip codes and demographic data of the target population. Describe the projected need for benefits application assistance in the proposed targeted Harris County service area. If already providing this service, describe the people and household served as well as their zip codes of origin.
- 3) Offeror shall describe an Outreach Plan including planned and coordinated efforts to communicate information about a host of public benefits and financial assistance programs with an overall intent to increase awareness, participation, and enrollment in BAP. Describe the marketing strategy that involves identifying, communicating with, and recording contacts with specific groups or individuals with those most in need of benefits and benefits application assistance. Offeror shall provide an outreach plan including General Outreach (e.g. social media, mailers, flyers etc.) and Targeted Outreach (sessions on-site or off-site, in-person or virtual, designed to provide information to likely eligible beneficiaries).
- 4) Describe the current capacity to provide outreach and navigation services including justification for the proposed Program Tier chosen see **Section II(D)**. Describe the agency's current partnership level with CPP and plans to upgrade to Level III status.
- 5) Describe the experience of key staff and the relevant experience of those working directly with clients. Describe any relevant training and/or certification(s). Describe the experience of navigators. If the organization plans to add staff for this project, describe the staffing plan (including the number of FTEs) and the relevant duties of the additional staff.
- 6) Provide the projected number of new applications, renewal applications, approved applications, and denied applications during the 17-month term of the program. Provide

- the projected number of unduplicated people and households who will be served over the 17-month term (these proposed figures must match those on the budget form).
- 7) Offeror shall describe its firm’s overall qualifications to successfully complete the scope of services. Knowledge of and competency in federal, state, and local safety-net benefits enrollment, rules, and eligibility as described in *Section II(C)(iv)*.
 - 8) Describe the follow-up process for families to determine if applications are approved, denied or require re-submission or appeal.
 - 9) Describe how high-quality benefits application navigation services will be provided and how families will be best supported in the process. What methods will be used to communicate with clients?
 - 10) Describe capacity to record client level data and ability to report the impact measures described in *Section II(E)*. Be specific about the methods to accurately track data.
 - 11) Describe how the organization aligns with the Harris County ARPA Equity Framework see **EXHIBIT B**
 - 12) Provide a budget narrative that must (1) demonstrate a knowledge of eligible uses, (2) provide sufficient description to calculate the amounts budgeted, (3) number of benefit applications to be completed, and (4) align with the description of services proposed to be provided. This item is located in the **Budget Form** and is required to be submitted in the excel format as provided. Please utilize only the Budget Form provided.

B. Budget Summary

Complete the Excel Budget Form provided. The following listed items are the expense categories provided in the BAP Budget Form. Please note that Helping Hands is a reimbursement-based program. Eligible Uses of Funds is reference *Section II(F)*.

- i. Personnel cost:
 1. Navigators related to benefits application assistance and outreach
 - a. Salary
 - b. Payroll taxes (employer)
 - c. Benefits (employer)
 2. Supervision
 - a. Salary
 - b. Payroll taxes (employer)
 - c. Benefits (employer)
- ii. Travel
- iii. Equipment
- iv. Supplies
- v. Other
- vi. Administration/Indirect costs (maximum 10% of direct costs)

C. Required Attachments

Required attachments should be submitted with proposal in the order below.
Proposals submitted without the listed attachments will be considered incomplete.

Include all attachments in the order listed:

1. Proposal Cover Sheet signed and dated by a Certifying Representative (see **EXHIBIT A**). These executed documents shall be placed in front of the proposal. Attachments 2-11 should follow the proposal Cover Sheet as one PDF. The fillable

Response Form has character limits. Responses that exceed the character limits or are not legible in the final PDF will not be included during review. The Proposal cover sheet includes the CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS and is provided as part of **EXHIBIT A**.

2. Evidence of good standing from the Texas Comptroller (Print from Link: <https://ourcpa.cpa.state.tx.us/coa/Index.html>)
3. Evidence of good standing from SAM (Print from Link <https://www.sam.gov>)
4. Résumés and/or job descriptions of key personnel including the background and qualifications of direct service staff
5. Evidence of 90-day working capital (copies of most recent 3 months of bank statements and financial statements)
6. Most recent financial audit
7. Documentation of Community Partner (CPP) status (if currently enrolled)
8. Completed Contractor Profile (**Exhibit C**)
9. Completed Certification of Compliance (**Exhibit D**)
10. Completed Certification Regarding Lobbying (**Exhibit E**)
11. Completed Subcontractor Listing Form (**Exhibit F**)
12. Submit a completed Budget Form in Excel format

Documents 1-11 shall be submitted as one continuous PDF tabbed and labeled by document. Please submit the combined PDF responses and the excel Budget Form with file names as follows:

Name of Organization (may abbreviated) – BAP Response

Name of Organization (may be abbreviated) – Budget Form (in excel)

EXAMPLE:

XYZ-BAP Response

XYZ-Budget Form

Checklist for Proposal Submittal

- _____ Cover Page (PDF) including the CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS
- _____ Fillable response form- We will not accept proposals after the due date.
- _____ Required Attachments (see **Section III(C) (1-11)**)
- _____ Budget Form (Excel Form)

IV. Evaluation, Negotiation, and Selection

- A. **Evaluation:** A designated committee evaluates each proposal in confidence and based on stated criteria. Points will be assigned for stated evaluation factors. A cost/price analysis will be conducted, and qualitative technical factors will be evaluated that include but are not limited to:
 1. Appropriateness, thoroughness, quality of the proposed work plan
 2. Provider experience and/or demonstrated knowledge of the benefits application assistance services
 3. Demonstrated successful past performance

4. Quality of proposed staffing
5. Demonstrated capacity to meet the goals and targets of the program
6. Number of benefit application completed and approved
7. Cost and cost per unit analysis

B. Negotiation:

1. Negotiations may be undertaken with offerors to achieve best and final offers
2. All negotiation procedures will be documented

C. Selection:

1. Contracts must be awarded to responsible organizations whose proposals are most advantageous to the program
2. All respondents will be notified of ACAM's selection in writing

V. General Provisions

A. AUTHORIZATION TO DO BUSINESS IN TEXAS

Offeror must obtain Texas Sales & Use Tax permit from the Texas State Comptroller Office if they are engaged in business in Texas and they are selling tangible personal property, leasing personal property, or selling a taxable service in Texas.

Offeror is required to have and maintain any licenses, certifications, and registrations required by the State of Texas, Harris County, or recognized professional organization governing the services performed under this contract (such as licensing requirements i.e. Licensed Electrician). The Texas Department of Licensing and Regulation is the primary state agency responsible for the oversight of businesses, industries, general trades, and occupations that are regulated by the state.

For businesses to legally operate in Harris County, Offeror must be registered with the Texas Secretary of State to transact business in Texas and must be current on all state and local fees and taxes, including but not limited to Franchise Account Status with the Texas Comptroller of Public Accounts in good standing, delinquent taxes, court judgments, tickets, tolls, fees, or fines.

A Sole Proprietorship, General Partnership, and all business entities (SP, LLC, INC, etc.) doing business under a name other than the name of the owner requires a DBA (Doing Business As) Certificate, which must be filed within the county of which they are doing business. If an Offeror's business isn't located in Harris County, Offeror must submit the licenses, certifications, and other documentation required by the locality in which its, or its subcontractors', business is based.

B. FIDELITY BOND

Fidelity Bond. Contractors may be required to have and maintain a Fidelity Bond, with a penal sum equal to the Program Fund, for the entire term of the Agreement. ACAM will not disburse funds until the contractor submits written proof of the Fidelity Bond.

The Fidelity Bond is solely for the protection of ACAM and Harris County from theft or dishonesty from contractor's employees as it relates to the administration of the services. If a Fidelity Bond is required, the bond shall be equal to ten percent (10%)

to one-hundred percent (100%) of the contract amount and provided prior to the execution of any contract.

C. COMPLIANCE WITH FEDERAL, STATE, AND LOCAL LAWS

The following regulations shall apply to this contract opportunity.

1. 2 CFR 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
2. 24 CFR Part 570 – Community Development Block Grants
3. Texas Local Government Code Section 262 – Purchasing and Contracting Authority of Counties in Texas
4. Texas Local Government Code Section 271 – Purchasing and Contracting Authority of Municipalities, Counties, and Certain Other Local Governments
5. Texas Government Code Section 2156 – Purchasing Methods
6. Texas Government Code Section 2269 – Contracting and Delivery Procedures for Construction Projects
7. Harris County Purchasing Rules and Procedures Manual (2013)
8. 24 CFR Part 135 – Economic Opportunities for Low- and Very Low-Income Persons, which implements Section 3 of the Housing and Urban Development Act of 1968.
9. Texas Health & Safety Code Section 361.426 – Governmental Entity Preference for Recycled Products

Offeror shall follow all Federal, State, and local laws, rules, codes, ordinances, and regulations applicable to Offeror's services.

ACAM operates its business ethically and in compliance with the law. We ask that any Offeror or Offeror's employee doing business with ACAM who believes he or she has witnessed any suspected ethical violation or fraud immediately report the allegations to the designated ACAM staff and Chief Assistant County Auditor – Audit Division 713-274-5673

All suspected criminal conduct will be investigated and reported to the District Attorney's Office or an appropriate law enforcement agency. Offerors who report suspected ethical violations or fraud can do so without fear of retaliation. Retaliating against any Offeror or Contractor for reporting suspected ethical violations or fraud is strictly prohibited.

In accordance with Texas Government Code 2270.002, Offeror must warrant that it does not boycott Israel and agrees that it will not boycott Israel during the term of this contract.

D. CONTRACTOR PROFILE

The Contractor Profile form (*Exhibit C*) must be completed and submitted.

E. DISQUALIFICATION OF OFFEROR

By submission of a Proposal, Offeror certifies that it has not violated the antitrust laws of this state codified in Texas Business and Commerce Code §15.01, et seq., as amended, or

the federal antitrust laws, and has not communicated directly or indirectly the submission made to any competitor or any other person engaged in such line of business. Any or all Proposals may be rejected if it is believed that collusion exists among Offerors.

F. E-MAIL ADDRESSES CONSENT

By submission of a Proposal, Offeror affirmatively consents to the disclosure of its e-mail addresses that are provided to ACAM. This consent is intended to comply with the requirements of the Texas Public Information Act, Texas Government Code Section 552.137, as amended, and shall survive termination of this agreement. This consent shall apply to e-mail addresses provided by Offeror, its employees, officers, and agents acting on Offeror's behalf and shall apply to any e-mail address provided in any form for any reason whether related to this Request for Proposals or otherwise.

G. GOVERNING LAW

This RFP is governed by the competitive proposal requirements of 2 CFR 200 "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards", the County Purchasing Act, and Texas Government Code Section 2269 et seq., Subchapter D, as amended. Where there is a difference in regulation, ACAM shall follow the more stringent regulation and shall require that Offeror comply with all applicable federal, state and local laws and regulations. In the event of any conflict of interpretation of any part of this overall document, ACAM's interpretation shall govern.

Offeror is further advised that these requirements shall be fully governed by the laws of the State of Texas and that ACAM may request and rely on advice, decisions and opinions of Harris County and of the Attorney General of Texas and the County Attorney concerning any portion of these requirements. Forum for contractual issues shall be in Texas and venue shall be in Houston, Harris County, Texas, in a federal or state court of competent jurisdiction. ACAM does not agree to binding arbitration and does not waive its right to a jury trial.

H. FUNDING

ACAM anticipates that all or partial funding for the project subject to this RFP will consist of federal grant funding. As such, in submitting a Proposal, Offeror acknowledges and is responsible for ensuring compliance with the general procurement standards applicable to Contractors, as detailed in 2 CFR 200. Any Contract awarded pursuant to this RFP shall include all required contract clauses for services and work associated with this project, and the selected Offeror shall include the applicable clauses in its subcontracts (see 2 CFR 200, Appendix II).

Offeror must also complete and return **Exhibit D**, Certification of Compliance with Federal Standards & Requirements, certifying its compliance with and understanding of its responsibility to ensure compliance with federal regulations. Failure to include the signed Certification of Compliance with Federal Standards & Requirements document with the Proposal submission may deem the Proposal as non-responsive. Failure to maintain compliance throughout the duration of the project or contract may be cause to terminate the contract.

Additionally, any contract entered into by ACAM that is to be paid in whole or in part

from government funds will be subject to termination for convenience by ACAM should sources of the funding become unavailable at any time for the continuation of services and further funding cannot be obtained for the contract. Such termination will be without liability to ACAM, other than for payment of services rendered prior to the date of termination.

I. HUB / MWBE UTILIZATION COMMITMENT

2 CFR 200.321 requires that Contractors take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. Contractors are required to facilitate Historically Underutilized Business (HUB) and/or Minority & Women-Owned Business Enterprise (MWBE) participation. Affirmative steps must include:

1. Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
2. Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
3. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
4. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; and
5. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.

Contractors must indicate which of their subcontractors will be HUB / MWBE using the Subcontractor Listing Form. Contractors must indicate the type of work to be performed by each firm and whether each firm is a HUB / MWBE or non-HUB / MWBE firm. Contractors must include certification or documentation when the Bidder itself, or its subcontractor(s), is HUB-certified by the Texas Comptroller of Public Accounts or the local MWBE of ice in their jurisdiction. ACAM and Harris County shall monitor and evaluate Contractors HUB / MWBE compliance throughout the contract period. Upon award, Contractor shall be responsible for providing reports in the format requested.

J. HISTORICALLY UNDERUTILIZED BUSINESSES

The State of Texas identifies any business at least 51 percent owned by an Asian Pacific American, Black American, Hispanic American, Native American, American woman and/or Service Disabled Veteran, who reside in Texas and actively participate in the control, operations and management of the entity's affairs as a Historically Underutilized Business (also considered MWBE).

K. NO UNAUTHORIZED CONTACTS

Offeror shall not contact any ACAM or Harris County personnel or and ACAM or Harris County Board members regarding this RFP during this RFP process with the exception of the designated procurement officer during the question-and-answer period. ACAM Purchasing may disqualify any Offeror who violate this procurement process. All correspondence relating to this RFP, from advertisement to award shall be sent to the

designated ACAM procurement office listed.

L. PUBLIC INFORMATION

All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act after the solicitation is completed and contract(s) executed with selected firm(s). Once opened, Proposals are public records. There are no exceptions. When submitting a Proposal, the Offeror must be sure to identify trade secrets or confidential information contained in the Proposal or redact confidential information if the information is needed to address requirements of the RFP. To the extent permitted by law, Offerors may request, in writing, non-disclosure of confidential data. Such information shall accompany the Proposal, be readily separable from the response, and shall be CLEARLY MARKED "CONFIDENTIAL." For those portions identified as confidential by Offeror, ACAM must rely on advice, decisions, and opinions of the Attorney General of the State of Texas relative to the disclosure of data or information.

ACAM will accept information clearly labeled "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY." ACAM will endeavor to inform the submitter of any request for the disclosure of such information. Under no circumstances, however, will ACAM be responsible or liable to the submitter or any other party for the disclosure of any such labeled information. Firms that indiscriminately identify all or most of their Proposal as exempt from disclosure without justification may, at ACAM's discretion, be deemed non-responsive.

ACAM will not advise as to the nature or content of documents entitled to protection from disclosure under the Texas Public Information Act, including interpretations of the act or the definitions of "Trade Secret," "Confidential," or "Proprietary."

If ACAM receives a Public Information Act request, prior to withholding any information, Offeror shall be required to execute an express agreement, in a form provided by ACAM, to indemnify, defend and hold harmless ACAM in any action to compel disclosure of any withheld material. If the Offeror refuses to sign such an agreement, ACAM shall have the right to disclose the entirety of the Proposal package, regardless of any marking or labeling of material as trade secret, confidential or proprietary. By submitting a Proposal, Offeror expressly waives any claims against ACAM for such disclosure in the absence of an express written indemnification agreement. Offeror shall provide to ACAM a specific legal basis for each portion of a Proposal sought to be withheld from disclosure.

M. RESPONSIBILITY REVIEW

ACAM shall conduct research to determine that an Offeror is responsible. Some methods to determine responsibility include:

- Compliance with Delivery and Performance Schedules: ACAM may request information on other active contracts Offeror is performing and verify the status with those buyers;
- Performance Record: ACAM may require Offeror to submit contact information for recent contracts they have performed for other customers

and contact them to ascertain Offeror's quality of performance, including timeliness of delivery/completion, quality of work, compliance with terms and conditions of the contract, and cost control, if applicable.

- Integrity and Business Ethics: ACAM may check local offices of Code Compliance and Business Licenses or other regulatory agencies for business ethics record and compliance with public policy. ACAM may verify Offeror's, and Offeror's subcontractors, compliance with payments, wage rates, and affirmative action requirements with other customers and with applicable State and Federal Government offices, e.g., DOL Wage and Hour Division;
- Necessary Organization, Experience, Operational Controls, and Technical Skills: ACAM may verify experience with other customers, request copies of audits, or verify that necessary personnel will be available to work on ACAM's contract; and
- Necessary Production and Technical Equipment and Facilities: ACAM may request evidence that Offeror has all the equipment and facilities he/she will need or the capability to obtain them.

Offeror is responsible for determining the responsibility of their prospective subcontractors. Offeror shall submit the Subcontractor Listing Form (**Exhibit F**) with its Proposal and provide information on any prospective subcontractors to be used. Determinations of prospective subcontractor responsibility may affect ACAM's determination of Offeror's responsibility. Offeror may be required to provide written evidence of a proposed subcontractor's responsibility.

ACAM may directly determine a prospective subcontractor's responsibility. In this case, the same standards used to determine Offeror responsibility shall be used by ACAM to determine subcontractor responsibility.

N. SUPPLEMENTAL MATERIALS

Offeror is responsible for including all pertinent product data in the returned Proposal package. Literature, brochures, data sheets, specification information, completed forms requested as part of the Qualifications package and any other facts which may affect the evaluation and subsequent contract award should be included. Materials such as legal documents and contractual agreements, which Offeror wishes to include as a condition of their Proposal, must also be in the returned Proposal package. Failure to include all necessary and proper supplemental materials may be cause to reject the entire Proposal.

O. REGULATORY REQUIREMENTS & PERMITS

Successful Offeror shall comply with all applicable federal, state, and local laws, rules, regulations, ordinances, and codes. Successful Offeror shall identify, prepare and/or obtain all licenses, documentation, coordination, testing, inspections, plans, reports, forms, and permits required to provide the services identified under this RFP, and as required by Local, State, and Federal Agencies, Departments, Boards, and Commissions at his/her own expense. Successful Offeror shall be responsible for supplying necessary reports and studies (if applicable) to the agencies as required and provide responses to their comments, as necessary.

Grievance Procedures for RFP Respondents to ACAM's BAP Program

Purpose

The purpose of the grievance procedure is to settle any grievance between an RFP respondent and Alliance of Community Assistance Ministries, Inc. (ACAM), as quickly as possible to assure efficient and fair procurement.

Eligibility

A grievance may be filed by any proposer that claims it has been adversely affected by:

1. The score assigned by the Independent Review Team.
2. Improper application of ACAM business rules, regulations and/or procedures.

Procedure for Filing Respondent Organization Grievances

The following steps must be followed in the order given. Time limits shall begin on the first working day after the applicable occurrence, filing, appeal, response, or recommendation. Working days shall not include weekends or national holidays.

Step 1

To be considered, a grievance must be filed in writing with ACAM within 24 hours preliminary contract award announcement. This written grievance should be sent to Sarah Malcolm, Director of Resiliency Programs at smalcolm@acamweb.org. ACAM has forty-eight (48) hours from receipt of the grievance form to respond to and resolve the grievance.

Step 2

If the respondent organization is not satisfied with the proposed resolution the respondent organization has twenty-four (24) hours to file an appeal with the ACAM Grievance Committee.

The Grievance Committee has forty-eight (48) hours to investigate, talk with the grievant and respond in writing using the official form.

General Provisions

The Grievance Forms provided by ACAM should be used in pursuing a resolution of the grievance.

The respondent organization may represent itself or be represented by a chosen representative when presenting the organization's grievance.

GRIEVANCE FORM FOR ACAM BAP PROGRAM RFP RESPONDENTS

Grievance Form

Respondent Organization: _____

Representative: _____ Title: _____

Address: _____ Phone: _____

We have discussed this complaint with the Director of Resiliency Programs and received her verbal answer on (date)_____. Because this answer is unacceptable to us, we wish to file a formal complaint.

Nature of grievance. Explain how your organization was unfairly treated including names and dates. (Use additional pages if needed.)

A just and fair solution of our grievance is:

We understand that if we wish to further appeal our complaint, we have twenty-four (24) hours from response to submit a grievance form to the next level of appeal. Grievances not appealed timely are considered settled at the previous level.

Date

Signature

GRIEVANCE PROCEDURE FOR THE ACAM BAP PROGRAM RFP RESPONDENT ORGANIZATIONS

Grievance Form Response from ACAM's Grievance Committee

Respondent Organization: _____

Respondent Representative: _____

ACAM's Grievance Committee Response to Respondent Organization's Complaint:

Grievances not appealed timely are considered settled at the previous level.

Date

Signature

EXHIBIT A: Cover Sheet

Organization (Offeror) Name and Address	Contact Person
Phone Number	RFP No. BAP-2024
Contact Email Address	EIN OR TAX ID Number
Cage Number	Annual Budget
Unique Entity Identifier (UEI)	# of Employee
Please identify the Application Level (check one option below)	
Level 1 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 3 <input type="checkbox"/>	
Name & Title of Certifying Representative. Note: “Certifying Representative” means the individual who may legally submit proposals for the agency and enter into agreements (i.e. the Chairman of the Board of a social service agency). You may identify a different contact person.	
Name:	Title:

I hereby certify that all information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate to the best of my knowledge.

AND

The undersigned, as Proposer, certifies that the Proposer has not, either directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competition in connection with this contract. The Proposer certifies they have not and will not participate in the development, review, and/or selection process.

Signature of Certifying Representative	Date

CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

The undersigned certifies, to the best of its knowledge and belief, that it and its principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal agency or ACAM;
- (b) Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification;
- (d) Have not within a three-year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for cause or default; and
- (e) Will submit to ACAM information about each proceeding that occurs during this Contract Term or during the recordkeeping period that:
 - (1) Is in connection with this award;
 - (2) Reached its final disposition during the most recent five-year period; and
 - (3) Is one of the following:
 - i. A criminal proceeding that resulted in a conviction, as defined below;
 - ii. A civil proceeding that resulted in a finding of fault and liability and payment of a monetary fine, penalty, reimbursement, restitution, or damages of \$5,000 or more;
 - iii. An administrative proceeding, as defined below, that resulted in a finding of fault and liability and your payment of either a monetary fine or penalty of \$5,000 or more or reimbursement, restitution, or damage in excess of \$100,000; or
 - iv. Any other criminal, civil, or administrative proceeding if:
 - 1. It could have led to an outcome described in this section (e) paragraph (3), items (i) – (iii) of this award term and condition;
 - 2. It had a different disposition arrived at by consent or compromise with an acknowledgment of fault on your part; and
 - 3. The requirement in this award term and condition to disclose information about the proceeding does not conflict with applicable laws and regulations.
 - (4) For purposes of section (e) of this certification the following definitions apply:
 - i. An "administrative proceeding" means a non-judicial process that is adjudicatory in nature in order to make a determination of fault or liability (e.g., Securities and Exchange Commission Administrative proceedings, Civilian Board of Contract

Appeals proceedings, and Armed Services Board of Contract Appeals proceedings). This includes proceedings at the Federal and State level but only in connection with performance of a Federal contract or grant. It does not include audits, site visits, corrective plans, or inspection of deliverables.

- ii. A “conviction”, for purposes of this award term and condition, means a judgment or conviction of a criminal offense by any court of competent jurisdiction, whether entered upon a verdict or a plea, and includes a conviction entered upon a plea of nolo contendere.

Where the undersigned Contractor is unable to certify to any of the statements in this certification, such Contractor shall attach an explanation of why it cannot provide said certification to this Contract.

The undersigned Contractor further agrees and certifies that it will include the below clause titled “Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Subcontracts/Lower Tier Covered Transaction,” without modification, in all subcontracts and in all solicitations for subcontracts:

“CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION – SUBCONTRACTS/ LOWER TIER COVERED TRANSACTIONS”

(1) The prospective lower tier participant/subcontractor certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal agency or ACAM.

(2) Where the prospective lower tier participant/subcontractor is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

LOWER TIER PARTICIPANT/ SUBCONTRACTOR:
Entity Name, Entity Type

By: _____ Signature Authority Name, Title

Date: _____ ”

This certification is a material representation of fact upon which reliance is placed when ACAM awards the contract. If it is later determined that Contractor knowingly rendered an erroneous certification, in addition to any other remedies available to the Federal Government, ACAM may terminate this Contract for cause or default.

CONTRACTOR:

Entity Legal: _____

By: _____

Name: _____

Title: _____

Date: _____

EXHIBIT B: Harris County Equity Framework

In recognition of the COVID-19 pandemic's impact on Harris County's residents and the exacerbation of long-standing inequities Black and Hispanic residents face, Harris County is committed to allocation ARPA Funds in initiatives that will support the long-term access to equitable resources and opportunities for all communities of Harris County. Commissioners Court has, as a result, adopted an Equity Framework by which the process of project selection, design, implementation, and evaluation will be guided. The Equity Framework will ensure that investments are made fairly, integrate input from communities most impacted by this project.

Harris County expects Offerors to design programs in line with the Harris County Equity Framework for Investments funded by the ARPA. For example, Offerors shall reference the framework when speaking to how they shall prioritize applicants. The full equity framework can be found in Bonfire under Public Files.

Equality Strategies

To ensure Harris County addresses existing inequities and inequities exacerbated by the COVID-19 pandemic, the County will employ the following strategies when developing, selecting, and delivering ARPA programs:

- Disaggregate historical data and outcome measures by race, ethnicity, gender, and/or geography and other demographic variables to identify inequities and ensure programs are prioritizing disproportionately impacted groups.
- Analyze specific factors underlying inequities such as racial and gender discrimination, disparate policy impacts, and institutional and structural barriers, adjusting program design accordingly.
- Include community representatives of groups disproportionately impacted by the pandemic throughout program development, delivery, and evaluation.
- Target resources and strategies to minimize incremental burdens on groups most affected by the pandemic while maximizing their access to relief.
- Evaluate the performance of projects through defined metrics and provide opportunities for reflection, creating space for continual improvement throughout implementation.
- Publish transparent program results via publicly available website and other outlets, ensuring performance information reaches disproportionately impacted groups.