



REQUEST FOR PROPOSAL

RFP 23-21

GRANT RESEARCH AND GRANT WRITING SERVICES

Shasta County

1450 Court St.

Redding, CA 96001

RELEASE DATE: March 30, 2023

DEADLINE FOR QUESTIONS: April 13, 2023

RESPONSE DEADLINE: April 28, 2023, 2:00 pm

RESPONSES MUST BE SUBMITTED ELECTRONICALLY TO:

<https://procurement.opengov.com/portal/shastaca>

Shasta County
REQUEST FOR PROPOSAL
GRANT RESEARCH AND GRANT WRITING SERVICES

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- A - Sample Personal Services Agreement
- B - Sample ACH- Direct Deposit Authorization

1. INTRODUCTION

1.1. Summary

The County of Shasta, through its Department of Support Services, Purchasing Unit, invites responses to a Request for Proposals (RFP) from qualified individuals or organizations to identify grant opportunities and to assemble funding applications for a wide array of grant opportunities with different funding agencies including but not limited to federal, state, private and non-profit.

1.2. Contact Information

Kelly McClure

Agency Staff Service Analyst II- Confidential
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Redding, CA 96001
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Phone: [\(530\) 225-5093](tel:(530)225-5093)

Department:

Purchasing Department

Department Head:

Leticia Swanson
Purchasing Analyst

1.3. Timeline

Release Date	March 30, 2023
Question Submission Deadline	April 13, 2023, 2:00pm
Proposal Submission Deadline	April 28, 2023, 2:00pm Electronic Submittal Location: https://procurement.opengov.com/portal/shastaca

2. DEFINITIONS

For the purposes of this RFP process, the following definitions apply:

Consultant means the person(s) or entity(ies) who enter into a Contract to provide GRANT RESEARCH AND GRANT WRITING SERVICES.

Contract means the written agreement between the County and any Responder selected. The County intends to use its Standard Personal Services Agreement (PSA), attached hereto and incorporated herein, as the template for the Contract which can be found in [ATTACHMENTS](#).

County Business Days means Monday through Friday except County holidays as designated by the Shasta County Board of Supervisors.

County Business Hours means 8:00 a.m. to 5:00 p.m., Pacific Standard Time, during County Business Days.

Proposal means the written submission to the County in response to this RFP.

Request for Proposal ("RFP") means this invitation to submit a Proposal.

Responder means any person or entity submitting a Proposal.

In the event any defined term is used in this RFP that is not defined in this document, the defined term shall have the meaning attributed to it in the Contract.

3. SCOPE OF WORK

3.1. Overview

The County wishes to contract with a qualified individual or organization who would be responsible for identifying viable grant opportunities, informing staff of grant opportunities, taking the lead role in writing grants, and developing grant compliance protocols.

Although the County is open to considering various options for achieving the above stated objectives, it is anticipated that the consultant(s) will perform the following tasks:

A. Funding Needs Analysis – Work with County staff to facilitate meetings with County Departments to assess the validity of current funding priority areas, identify changes in funding priority areas, and identify new priority areas for possible funding.

B. Grant Funding Research – Conduct research to identify grant resources including, but not limited to Federal, State, foundation, agencies, and organizations that support the County’s funding needs and priorities (emphasizing grants which require no “matching” funds), including but not limited to:

Economic development, Homeless and housing programs, Infrastructure development and maintenance, Health and wellness programs, technology, workforce development, records management, and senior, family and youth programs.

C. On-Call Grant Research – In addition to the areas defined above, other areas may also be identified through the funding needs analysis process and throughout the duration of the contract. The Scope of Work may also include researching grant opportunities identified by the County.

D. Grant Proposal Development – At the direction of the County, provide general grant proposal writing services associated with the completion of grant applications on behalf of the County, including the preparation of funding abstracts and production, and submittal of applications to funding sources. A copy of each grant application package submitted for funding, in its entirety, shall be provided to the County.

4. REPORTING REQUIREMENTS

A successful consultant shall submit monthly reports to the County summarizing the amount of time expended, describing activities undertaken during the previous month, and status of those activities. The Contract will require, among other duties and responsibilities, the submission of a written annual report, which must include an analysis of progress toward previously established goals and outcomes.

5. CONTRACT INFORMATION

If the County chooses to fund and proceed with the agreement, it will enter into a Contract with the selected Responder or Responders. The County intends to use its Standard Personal Services Agreement (PSA), attached to this RFP (in [ATTACHMENTS](#)) as a template for the Contract. Certain terms of the County's Standard Personal Services Agreement (PSA) template are subject to negotiation and completion once the successful Responder(s) is/are selected. The County may, in its sole discretion, agree to modify a term that is otherwise not subject to negotiation.

Upon negotiation of the contract, the chosen responder must agree to receive electronic payments, and will be required to complete the ACH/Direct Deposit Authorization form, attached (in [ATTACHMENTS](#)) to this RFP.

The Contract will be for an initial term of 1 year and may contain a provision for an extension of the initial term for an additional 1 year term. Exercise of the option to extend the term of the Contract will be based on continued funding, the results of an evaluation of the services provided, and the County's subjective satisfaction with the Contractor's performance.

The County will treat all information submitted in a proposal as available for public inspection once the County has completed negotiations with a contractor. If you believe that you have a legally justifiable basis under the California Public Records Act (Government Section 6250 et. seq.) for protecting the confidentiality of any information contained within your proposal, you must identify any such information, together with the legal basis of your claim in your proposal.

6. RFP PROCESS, PROPOSAL FORMAT & GENERAL INFORMATION

6.1. INQUIRIES

To make inquiries regarding this RFP, Responders may contact only the RFP Contact and are specifically directed not to contact other County officers, employees, or agents on any matter related to this RFP. Failure to comply with the preceding sentence may result in a Responder being barred from consideration under this RFP. For purposes of this section of this RFP, the word “officer” does not include members of the Shasta County Board of Supervisors.

Any Responder who attempts to influence the RFP process by interfering or colluding with other Responders and/or with any County officer, employee, or agent; or who deviates from the RFP process as set forth in the requirements, or terms and conditions of the RFP, may be disqualified at any time from further participation in the RFP process.

Responder(s) shall submit all inquiries regarding this bid via the County e-Procurement Portal, located at <https://procurement.opengov.com/portal/shastaca>. Please note the deadline for submitting inquiries. All answers to inquiries will be posted on the County e-Procurement Portal. Responder(s) may also click “**Follow**” on this bid to receive an email notification when answers are posted. It is the responsibility of the Responder(s) to check the website for answers to inquiries.

6.2. PROPOSAL FORMAT & CONTENT

Responses to this Request for Proposals (RFP) are subject to the terms and conditions incorporated herein.

Each response must include the following required information and documents:

- A. Complete the electronic [VENDOR QUESTIONNAIRE](#)
- B. A narrative describing relevant experience comparable to the Scope of Work.
- C. Describe your project and management approach and your method for completing grant applications, including quality assurance and document management.
- D. An explanation of availability and a schedule/timeline of each element of the services to be provided as identified herein.
- E. A sample grant proposal written by Responder that was successfully awarded.
- F. Cost proposal – Proposed pricing for services as described in the Scope of Work. Include personnel hourly rates as well as related travel costs (lodging, meals, mileage, and any other applicable costs).

6.3. EVALUATION CRITERIA AND PROCEDURE

- A. The Contract, if awarded, will be awarded to the Responder or Responders submitting the Proposal(s) deemed, by the County, in its sole discretion, to be in the best interest of the County. The County is not required to enter into a Contract with the particular Responder who submits the least costly Proposal. If only one Responder submits a Proposal, the County may, at its sole discretion, enter into negotiations with that Responder or terminate the RFP process.
- B. Failure to fully comply with all of the requirements of this RFP and to provide all requested information may result in the Proposal being rejected and given no consideration. The determination of compliance with the terms and conditions of this RFP will be in the County's sole judgment and its judgment will be final and conclusive.
- C. Should more than one Responder submit a Proposal, the following evaluation process will be used to select the Contractor. The factors such as, but not limited to, the following will be considered in the evaluation process: See [EVALUATION PHASES](#)
- D. After receiving the Proposals, the County may schedule interviews at its sole discretion with some or all of the Responders and may establish a ranked list of the Proposals. The Responder receiving the highest ranking may be asked to enter into the Contract negotiation stage.
- E. If an agreement to enter into a Contract cannot be reached with the Responder receiving the highest ranking, then the negotiations with that Responder will be terminated. Negotiations may then be opened with the next ranked Responder and the process repeated, or the County may elect at any time to reject all submitted Proposals and terminate this RFP process. Once negotiations with a particular Responder are terminated, the County will not reopen negotiations with that Responder.
- F. Notwithstanding anything to the contrary in this RFP, the County reserves the right to award the Contract to the Responder(s) whose Proposal is determined by the County, in its sole discretion, to be in the best interest of the County. The County is not required to award the Contract to the Responder that submits the least costly Proposal. Furthermore, the County reserves the right to award one or more Contracts to one or more Responders as a result of this RFP.
- G. If a Responder is selected and a Contract is negotiated with that Responder, the County shall issue a written Notice of Intent to Award a Contract to each Responder that submitted a Proposal. The County shall consider any protest or objection, from qualified responders, to the Contract award pursuant to this RFP provided that it is submitted in writing and received by the County's contact person at the address listed in this RFP within 10 calendar days of the date stated on the County's written Notice of Intent to Award a Contract. The protest shall identify all bases on which the protest is based. Any protest or objection will be considered and resolved by the Director of Support Services, or his/her designee, in his/her sole discretion and whose decision shall be final and conclusive. The Contract may be executed by the County after the

expiration of the time period to protest or object, or after a final decision on any protest or objection, whichever is later.

6.4. SUBMISSION OF RESPONSES

Responses may be submitted electronically via <https://procurement.opengov.com/portal/shastaca>.

All responses must be submitted no later than the exact Closing Date and time indicated on this Request for Proposals.

Proposals may be modified or withdrawn at any time prior to the RFP closing Date and time by an authorized representative of the Responder. Each Responder warrants and represents that the information provided in the Responder's Proposal shall remain unchanged for the time period as indicated on the Attachment Proposal Summary and Certifications. Responder acknowledges that County will be relying on the information contained in the Proposal.

6.5. USE AND DISCLOSURE OF PROPOSALS

- A. The County reserves the right to retain all Proposals that are submitted and to use any ideas in a Proposal regardless of whether a Proposal results in a Contract. All Proposals become the exclusive and sole property of the County. The County will not reimburse Proposal preparation or submission expenses or costs, all of which are the Proposer's sole responsibility.
- B. Unless otherwise compelled by a court order or other legal authority, the County will not disclose any Proposal while the County reviews and evaluates Proposals and engages in negotiations with one or more Responders. However, after the County either issues a Notice of Intent to Award or the County issues a written notice of termination of the RFP process, the County shall consider each Proposal and related documents a matter of public record and subject to the public disclosure requirements of the California Public Records Act (California Government Code sections 6250, et seq.), unless there is a legal exception to public disclosure.
- C. If a Responder believes that any portion of its Proposal is subject to a legal exception to public disclosure, the Responder shall: (1) clearly mark the relevant portions of its proposal "Confidential"; and (2) identify the legal basis for exception from disclosure. By submitting a Proposal, a Responder agrees that County shall not in any way be liable or responsible for the disclosure of any Proposal or any part thereof if disclosure is pursuant to the Public Records Act or otherwise pursuant to law or legal process. By submitting a Proposal, the Responder agrees to save, defend, keep, hold harmless, and fully indemnify County, its elected officials, officers, employees, agents and volunteers from all damages, claims, costs, or expenses, whether in law or in equity, that may at any time arise for not disclosing any portion of a Proposal marked "Confidential" to a third party.
- D. The County will treat all information submitted in a proposal as available for public inspection once the County has completed negotiations with a contractor. If you believe that you have a

legally justifiable basis under the California Public Records Act (Government Section 6250 et. seq.) for protecting the confidentiality of any information contained within your proposal, you must identify any such information, together with the legal basis of your claim in your proposal.

- E. Initiation of this RFP does not commit the County to finalize a Contract with any Responder or to be bound by any Proposal. The County shall not be liable for any costs related to the preparation and submission of a Proposal, costs related to the negotiation process, and/or costs otherwise incurred by any Responder related to this RFP process. All such costs shall be borne by the Responder(s).
- F. Notwithstanding any other provisions, the County reserves the right, in its sole discretion to:
 - 1. Accept or reject any or all Proposals, or any part(s) thereof;
 - 2. Reject any Proposal for failure to submit the Proposal in conformity with the requirements, or the terms and conditions, of this RFP;
 - 3. Waive any informalities or irregularities in a Proposal, or to waive any deviations from the requirements, or terms and conditions of this RFP, if deemed to be in the best interest of the County;
 - 4. Negotiate with a Responder or Responders; or
 - 5. Solicit new proposals on the same Project or on a modified project which may include portions of the original proposed Project as in the best interest of the County; or
 - 6. Terminate, in part or its entirety, the RFP process.
- G. Any Responder submitting a Proposal understands and agrees that submission of his/her/its Proposal shall constitute acknowledgment and acceptance of, and intent to comply with, all the requirements, and terms and conditions of this RFP.
- H. The County shall not be liable for, and by submitting a Proposal the Responder agrees not to make any claims for, or have any right to, damages because of any misunderstanding or misrepresentation of the requirements, or terms and conditions, of this RFP, or because of any misinformation or lack of information
- I. In the event it becomes necessary to revise any part of this RFP, an addendum will be published. Responders will be notified of Addendum(s) automatically by following this procurement.

7. EVALUATION PHASES

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Responder's Background and Experience in Performing Similar Projects	0-10 Points	30 <i>(30% of Total)</i>
2.	Price Identified for Services	0-10 Points	25 <i>(25% of Total)</i>
3.	Organization and Approach	0-10 Points	20 <i>(20% of Total)</i>
4.	Sample Grant Proposal	0-10 Points	15 <i>(15% of Total)</i>
5.	Availability and Schedule are appropriate	0-10 Points	10 <i>(10% of Total)</i>

8. VENDOR QUESTIONNAIRE

8.1. Request for Confidentiality of Proprietary Information

If a Responder believes that any portion of its Proposal is subject to a legal exception to public disclosure, the Responder shall: (1) clearly mark the relevant portions of its proposal “Confidential”; and (2) identify the legal basis for exception from disclosure. By submitting a Proposal, a Responder agrees that County shall not in any way be liable or responsible for the disclosure of any Proposal or any part thereof if disclosure is pursuant to the Public Records Act or otherwise pursuant to law or legal process. By submitting a Proposal, the Responder agrees to save, defend, keep, hold harmless, and fully indemnify County, its elected officials, officers, employees, agents and volunteers from all damages, claims, costs, or expenses, whether in law or in equity, that may at any time arise for not disclosing any portion of a Proposal marked “Confidential” to a third party.

8.1.1. *Request for Confidentiality of Proprietary Information**

The Offeror, by the undersigned representative, requests that the specific information, described below and identified on the page or pages of the Offer in which it appears, be treated as confidential information and protected from disclosure to the public.

1. Description of specific information that is the subject of the request.
2. The legal basis for exception from disclosure.

Enter N/A if this does not apply

*Response required

8.2. Statement of Experience

8.2.1. *Business Status**

- Non-Profit Corporation
- General Partnership
- Limited Partnership
- Corporation
- Sole Proprietorship
- Other:

*Response required

8.2.2. *If Other:*

Please define:

*8.2.3. Number of years in business under present business name? **

*Response required

*8.2.4. Have you ever used another Business Name? **

If yes, please provide the business name and number of years in operation.

If no, please indicate with a N/A

*Response required

*8.2.5. Number of years' experience providing equivalent or related services?**

*Response required

*8.2.6. Contracts completed during the last 5 years:**

Example Format:

Year, Services Provided, Contract Amount, Location, Contracting Agency

- 1.
- 2.
- 3.
- 4.
- 5.

*Response required

*8.2.7. Have you, or your agency, failed or refused to complete a contract?**

If yes, please explain in the next question

Yes

No

*Response required

8.2.8. If yes:

If yes to the above question, please explain in more detail

*8.2.9. Do you or your agency hold a controlling interest in any other organization, or is this agency or business owned or controlled by another organization or agency? **

If yes, please explain in the next question

Yes

No

*Response required

8.2.10. If yes:

If yes to the above question, please explain in more detail

*8.2.11. Do you, or your agency, hold or have a financial interest in any other business?**

If yes, explain (unless you are the individual personally performing contracted services or a governmental agency):

Yes

No

*Response required

8.2.12. If yes:

If yes to the above question, please explain in more detail

*8.2.13. Names of persons with whom you, or your agency, have been associated in business as partners or business associates in the last five years. (Government agencies are exempt) **

If none/exempt, please indicate with a N/A

*Response required

*8.2.14. Explain any litigation involving you, your agency, or any principle officer(s) thereof (if applicable):**

If not applicable, please indicate with a N/A

*Response required

*8.2.15. Provide a description of experience in the services to be provided, and the experience of principle individuals who will be performing services: **

*Response required

*8.2.16. List any major equipment to be used for the direct provision of services: **

*Response required

*8.2.17. Most recent audited financial statement**

Please attach a copy of your most recent audited financial statement, for a fiscal period not more than 18 months old at time of submission, by an independent certified public accountant. If one is not available, a profit and loss or similar type income statement in order to demonstrate fiscal stability.

See California Department of Social Services, Manual of Policies and Procedures, Section 23-610 (c) (15)(L) for full details of this requirement.

*Response required

*8.2.18. Do you or your agency agree, at the request of the County, to provide letters of credit, and guarantor letters from related entities?**

Yes

No

*Response required

*8.2.19. Please provide a list of commitments, and potential commitments which may impact assets, lines of credit, guarantors letters, or otherwise affect you or your agency's ability to perform:**

If none, please indicate with a N/A

*Response required

*8.2.20. If the nature of the services requires business or professional licenses, are such licenses held by you and/or your agency?**

Yes

No

*Response required

*8.2.21. Do you and/or your agency agree to provide additional information as required by the County to make an informed determination of qualifications? **

Yes

No

*Response required

*8.2.22. Do you and/or your agency agree to permit the County, State, and Federal governments to audit financial and other records pertinent to the services provided? **

Yes

No

*Response required

8.3. Certifications:

8.3.1. *Comply with specifications**

Do you agree to comply with specifications, RFP instructions, draft Contract requirements and other pertinent references contained in this RFP?

Yes

No

*Response required

8.3.2. *Price Hold**

Do you agree that the information and costs provided in the proposal will remain unchanged and will not be withdrawn for a period of 90 days after the submission deadline?

Yes

No

*Response required

8.3.3. *Certify Accuracy of Response**

Do you certify that all statements contained within the submitted Proposal are true, and acknowledge that if the Proposal is found to contain any false statements, the County may declare any Agreement or Contract made as a result of the Proposal to be void?

Yes

No

*Response required

8.3.4. *Additional Information**

Do you agree to provide the County with any other information the County determines is necessary for accurate determination of your qualifications to provide the requested services?

Yes

No

*Response required

8.3.5. *All Costs Included**

Do you certify that the proposal includes all costs incident to the proposed Contract?

Yes

No

*Response required

*8.3.6. ACH/Direct Deposit Authorization**

Upon execution of the Contract, the chosen responder must agree to receive electronic payments, and will be required to complete the ACH/Direct Deposit Authorization form, attached herein. Do you agree to be an ACH/Direct Deposit vendor?

Yes

No

*Response required

*8.3.7. References**

You give permission for the County to contact any and all references provided.

Yes

No

*Response required

8.4. Submittal Requirements

*8.4.1. Provide a narrative describing relevant experience comparable to the Scope of Work.**

*Response required

*8.4.2. Describe your project and management approach and your method for completing grant applications, including quality assurance and document management.**

*Response required

*8.4.3. Provide an explanation of availability and a schedule/timeline of each element of the services to be provided as identified in the proposal.**

*Response required

*8.4.4. Upload a sample grant proposal written by Responder that was successfully awarded.**

*Response required

*8.4.5. Please provide a narrative for your cost proposal. **

Proposed pricing for services as described in the Scope of Work. Include personnel hourly rates as well as related travel costs (lodging, meals, mileage, and any other applicable costs).

*Response required