

California Mental Health Services Authority (CalMHSA) Request for Proposals (RFP)

Marketing, Outreach, and Education

Applications due by 5:00pm on September 2, 2022

*** Potential responders must submit proposals through CalMHSA's e-Procurement Portal (Bonfire) at
<https://calmhsa.bonfirehub.com> ***

The RFP does not constitute a contract or an offer. In addition, any contract awarded as a result of this RFP is subject to any additional restriction, limitation, or condition enacted by CalMHSA in any manner. CalMHSA reserves the right to make one award, multiple awards, or to reject all proposals, in whole or in part, submitted in response to this RFP.

CalMHSA reserves the right to amend this this RFP via written addendum or cancel at any time.



Table of Contents

- 1. Introduction and Process**
 - 1.1 Issuing Body
 - 1.2 RFP Summary
 - 1.3 Proposal Timeline
 - 1.4 Submittal Address
 - 1.5 RFP Questions and Clarifications
 - 1.6 Bidders Conference
 - 1.7 Withdrawal
 - 1.8 Joint Proposal and Subcontractors
 - 1.9 Conflict of Interest Policy
 - 1.10 Review of Applications
 - 1.11 Negotiations and Potential Proposers
 - 1.12 Protest Procedures
 - 1.13 Notice Regarding Public Record Act Requests
 - 1.14 Length of Project Period
 - 1.15 Format of Proposal
- 2. Eligibility**
 - 2.1 Minimum Qualifications
 - 2.2 Evaluation Criteria

1.1 Issuing Body

The California Mental Health Services Authority (CalMHSA) is a Joint Powers Authority, an independent government agency created by California Counties and Cities, focused on the efficient delivery of California mental health projects for its Members. CalMHSA works collaboratively with the Member Counties/Cities to implement mental health services, project, and educational programs across the state.

1.2 Project Overview

CalMHSA is seeking proposals from organizations and individuals with a history of developing marketing, outreach, and education materials for community stakeholders, appointed and elected officials, potential funders, and partner organizations. **The initial award amount shall not exceed \$200,000.**

The deliverables of the marketing, outreach, and education contact are as follows:

- Reach and inform intended target populations (as mentioned above);
- Develop effective communication tools which may include, but are not limited to:
 - One-page briefs
 - Informational flyers
 - Talking points
 - Program/project impact statements,
 - Social and digital media assets,
 - Press releases,
 - PowerPoint templates and presentations,
 - Infographics and other data visualization assets.
- Update current marketing, outreach, and education tools and resources.
- Increase effective messaging on current and future CalMHSA administered programs/projects.

Contract amounts depend on funding availability and will be negotiated annually between CalMHSA and the selected organizations.

1.3 Proposal Timeline

EVENT	Key Dates
RFP Issued	8/2/2022
Bidders Conference	8/5/2022 12pm PST
RFP Questions Due	8/12/2022 5pm PST
RFP Questions Answered	8/17/2022 5pm PST
Letter of Intent to Submit Due	8/19/2022 5pm PST
Deadline for Proposals to be Submitted	9/2/2022 5pm PST
Application Review	9/5/2022 – 9/16/2022

1.4 Submittal Address

Please upload your electronic proposals to CalMHSA's e-Procurement Portal:

<https://calmhsa.bonfirehub.com>.

IMPORTANT NOTICE: Due to COVID-19 Pandemic, CalMHSA will not accept hard copy submissions.

1.5 RFP Questions and Clarifications

All questions and requests must be submitted through CalMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com>. The deadline to submit questions for this RFP is by 5:00pm PST on **8/12/2022**.

The FAQ responding to the questions will be posted by 5:00pm PST on **8/17/2022** at <https://calmhsa.bonfirehub.com>.

To ensure all parties have access to the same information at the same time, except as stated below, CalMHSA will NOT respond to questions as they are received and will not accept telephonic questions.

CalMHSA will not send out emails following the posting of the FAQ. It is the sole responsibility of the proposer to refer to the FAQs, which will be posted on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com>.

If a Proposer is unable to submit questions via the Bonfire e-Procurement Portal, the Proposer must provide CalMHSA with an email justification outlining why the Proposer is unable to do so.

If a question relates to a proprietary/trade secrets aspect of a proposal and the question would expose proprietary information if disclosed to competitors, the proposer must mark the question as "CONFIDENTIAL." With the question, the proposer must submit a statement explaining why the question is sensitive. If CalMHSA concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered by email reply, and both the question and answer will be kept in confidence. If CalMHSA does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be notified and asked whether the vendor would like the question to receive a public response or no response at all.

1.6 Bidders Conference

The Bidders Conference will be held on **8/5/2022 (12:00pm – 12:30pm PST)** via Zoom. The meeting invite will be posted on the CalMHSA website, and a link is included [here](#). A recording of the Bidders Conference will be posted by 5:00pm PST 8/8/2022 and will be available on CalMHSA's e-Procurement Portal [here](#). Candidates that plan to submit a proposal must submit a letter of intent through CalMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com> by 5:00pm PST on **8/19/2022**. Following the receipt of the letter of intent by CalMHSA, the proposer will be sent a DocuSign confirmation that must be signed and returned to CalMHSA. The DocuSign signature will affirm the proposer's intent to apply and confirm that the proposer has not had any prior communication which would give them an unfair advantage over other potential proposers.

1.7 Withdrawal

A proposer may withdraw or amend its proposal, but only before the Application Submittal Deadline, directly on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com>.

1.8 Joint Proposals and Subcontractors

CalMHSA will accept joint proposals, however one organization must be listed as the lead proposer. All roles and responsibilities must be clearly described in the proposal. Subcontractors may also be included with roles clearly defined.

1.9 Review of Applications

CalMHSA will receive all applications and review for completeness and adherence to the RFP rules stated in this document. Following the initial review, all qualified applications will be reviewed and scored by a review panel. The evaluation panel will conduct a fair and impartial evaluation of proposals received in response to this RFP.

The review panel is comprised of individuals with varied backgrounds, to include professional expertise, lived experience, personal knowledge, etc. Panelists' information will not be disclosed as a matter of confidentiality. CalMHSA is committed to ensuring the RFP review panel is representative of California's racial, ethnic, and cultural diversity.

1.10 Negotiations with Potential Proposers

Selection will not be based exclusively on price. CalMHSA reserves the right to negotiate with proposers who, in the opinion of the review panel, have submitted the best proposal in an attempt to reach an agreement. If no agreement is reached, CalMHSA may negotiate with other proposers or may choose to extend the proposal period. CalMHSA also reserves the right to meet with vendors to gather additional information. Additional information may include, but is not limited to, a demonstration of skills described in the proposal.

1.11 Protest Procedures

Protests must be received no later than five (5) business days after the Notice of Intent to Award is posted on the CalMHSA website. The sole bases for protest are that the award was (1) in violation of law, (2) in violation of the provisions of this RFP, or (3) in violation of CalMHSA's procurement process. All protests must be in writing and (1) state in detail each and every ground asserted for the protest, citing to the law, RFP provision, or particular provision of the procurement policy on which the protest is based; (2) explain why the error prevented the aggrieved organization from being awarded the contract; and (3) identify the remedy sought.

Within 14 days of receipt of any protest, CalMHSA's Executive Director will provide a written decision which shall be final upon transmission to the protesting party. If the Executive Director determines that the error identified by the protesting party has deprived that party from receiving the contract, the Executive Director may act to rectify the error, including but not limited to cancellation of the RFP or proposed contract, correction or other revision of the awarded contract, termination of an improperly awarded contract, or affirmation of an existing contract if the discovered defect is immaterial or the Executive Director determines that affirmation is in the best interest of CalMHSA.

1.11 Notice Regarding Public Records Act Requests

CalMHSA is subject to the Ralph M. Brown Act and the California Public Records Act. All proposals received for this RFP are ultimately subject to public review; however, during the competitive bid process, all proposals will be kept confidential. Upon award and execution of contract by awardee(s), all proposals and supplemental information will be subject to public review, with the exception of those elements of a proposal which contain elements that are clearly marked as confidential or trade secrets. Any such designation should be accompanied by a brief explanation of the reason the information is non-public and protected from disclosure under California law. CalMHSA reserves the right to disregard such designations if they have been applied indiscriminately to non-protected information, and in no event shall CalMHSA, its agents, representatives, consultants, directors, or officers be liable to a responding party for the intentional or inadvertent disclosure of all or a portion of a proposal submitted under this RFP, regardless of whether it was marked as confidential or trade secret.

Although the California Public Records Act allows certain confidential or trade secret information to be protected from disclosure, CalMHSA may not be in a position to establish that the information submitted is protected. If CalMHSA receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSA will use reasonable efforts to notify the responding party of the request and give such party an opportunity to assert, at its own expense, a claimed exception under the California Public Records Act or other applicable law within the time period specified in the notice issued by CalMHSA and allowed under the California Public Records Act.

1.12 Length of Project Period

Selected proposals will be awarded a one-year, contract based on available funding. However, the project period lasts three fiscal years. Contracts will be renewed annually, based on available funding. CalMHSA reserves the right to terminate or extend contracts as deemed appropriate, including beyond the 3rd year project period.

1.13 Format of Proposal

Proposals shall be in Calibri, 12-point font, double-spaced, and in compliance with the page limits stated at the beginning of each section's description.

Proposals must be submitted through CalMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com>. Submissions by other methods will not be accepted. Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. Javascript must be enabled.

Browser cookies must be enabled. Respondents should contact Bonfire at Support@GoBonfire.com for technical questions related to submissions or visit Bonfire's help forum at <https://bonfirehub.zendesk.com/hc>.

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. The maximum upload file size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.

Marketing, Outreach, and Education Development

Eligibility

2.1 Minimum Qualifications

Proposers must meet the minimum qualifications listed here.

- 2.1.1 The Proposing organization must be able to demonstrate significant staff experience planning, developing, and delivering marketing, outreach, and education materials for public sector agencies.
- 2.1.2 The proposer shall have proven experience working with public agencies on effective dissemination and utilization of marketing, outreach, and education materials.
- 2.1.3 Respondent must demonstrate that it has previously assembled and managed a team of individuals or subcontractors/partners and specialists with the necessary skills leading to successful outcomes. The team may consist of individuals, subcontracts, or partnerships with other organizations. The exact nature of the subcontracts or partnerships must be described, including organization names, key staff, qualifying experience, and contractual relationships between the proposer and the subcontractor(s)/partner(s).
- 2.1.4 The proposer must demonstrate their experience developing marketing, outreach, and education materials for mental health, healthcare information and technology, social determinants of health, equity, and social justice (or lack of) programs/projects.
- 2.1.5 Ability to take direction from contract manager and clearly implement the strategies effectively.
- 2.1.6 The proposer should identify personnel and strategies to ensure messaging is vetted and appropriate based on the subject and target populations, as identified by CalMHSA.
- 2.1.7 Respondents must not currently have a Settlement Agreement with CalMHSA or any of CalMHSA's Members or the Member's County.

2.2 Evaluation Criteria

Proposals will be reviewed by CalMHSA upon submission to determine if the proposal contains all required documentation.

Following the initial review by CalMHSA, all qualified proposals will move to a scoring and evaluation phase. The review panel will consist of professionals with significant experience with California's mental health services and the needs of the communities to be served. The panel may consist of County Behavioral Health Directors, County Behavioral Health staff, and/or other knowledgeable individuals. Please see subsection 1.8 for further information on the evaluation period.

Scoring will be based on answers provided in the questions below.

Section I: Past Experience

1. Past experience working with public agencies developing marketing, outreach, and education materials.

Section II: Executive Summary

Proposer shall develop an executive summary document which describes at a high-level (3 Pages Maximum):

1. Process for developing marketing, outreach, and education materials;
2. The use of Key Performance Indicators (KPI) or other metrics that will demonstrate effectiveness of marketing, outreach, and education materials;
3. Current relationships with local, state, and federal appointed and elected officials;
4. Subcontractors and/or partners.

Executive Summary shall describe the subcontractors and/or partners for the proposal and their designated role.

Section III: Scope of Work

The proposer shall develop a proposed Scope of Work. The proposed scope of work should include all of the following (No longer than 10 pages):

*Note: Scope of Work is subject to change due to, but not limited to, terms as agreed to by the parties during contract negotiations, pandemic /crisis, availability of funds, etc.

1. **Description of staff expertise:** The Proposer shall describe their organizational expertise, and the expertise of the staff who will be involved on the project. Descriptions should include, but are not limited to, number of years' experience, experience managing similar projects of this scale, and evidence of past implementation efforts. Staff resumes/CVs can be included as attachments and do not count against the total page limit.
2. **Goals/Outcomes:** Clearly describe the ultimate outcomes to be achieved with the project proposal, including the process and timelines for completion. The proposal shall also describe how the market analysis, best practices, and CalMHSA input will result in the development of a new marketing, outreach, and education materials.
3. **Activities and strategies:** The proposal shall describe the activities and strategies that will be utilized to meet the needs of the outcomes and goals of the newly developed marketing, outreach, and education materials.

The development process should factor how the newly developed resources may be linguistically and culturally adapted up to 13 threshold languages.

4. Budget

Please provide CalMHSA with a budget narrative of the proposed budget for the project. The narrative may not exceed 2 pages. Please note that the budget must be within the funding provided above. Indirect Expenses may not exceed 15% of the total budget.