

US Probation  
Central District of California  
July 2018

# BIDDERS' CONFERENCE

# Goals of Bidders' Conference

- Clarify Request for Proposal and Process
- Record and Answer Questions

# Commonly Used Terms/Acronyms During Presentation

- RFP - Request for Proposal
- BPA - Blanket Purchase Agreement
- BPA # (aka solicitation #)
- AO – Administrative Office of the United States Courts.
- PC- Project Code
- JTR- Judiciary Travel Regulations
- Technically Acceptable

# Commonly Used Terms/Acronyms During Presentation

- USPO - United States Probation Officer
- Offender – Adult supervised by USPO
- USPSO -United States Pretrial Services Officer
- Defendant – Adult supervised by USPSO

# US Probation and Pretrial Services

## ⦿ Overview of Types of Referrals

- Types of Offenses
- Typical Disorders
- Treatment Needs

# US Probation and Pretrial Services

## ◉ Who is the Client?

- US Probation/Pretrial Services
- US District or Magistrate Court
- The Community
- The Defendant/Offender

# Central District California

- The counties that make up the Central District of California are the following: Los Angeles, Orange, Santa Barbara, Ventura, Riverside, San Bernardino, San Luis Obispo.

# Teamwork

- ① Teamwork between the Treatment Provider and US Probation/Pretrial Services is critical for defendant/offender success.
- ① This is based on frequent communication and prompt notification.



# Goal of RFP Process

- Provide geographically accessible quality treatment services to defendants/offenders in the Central District of California.

# Types of RFPs

- Substance Abuse and Mental Health Outpatient
- Substance Abuse Outpatient
- Mental Health Outpatient

# Types of RFPs

- Substance Abuse Residential
- Co-Occurring Residential
  - Must have male and female beds for SA and CO residential
- Medical Detox
- Sex Offender Treatment

# RFP Completion Instructions

- ◎ Section L
  - Provides instructions for each Section of the RFP
- ◎ RFP Cover Letter
  - Provides additional instructions
- ◎ Section M
  - Provides Evaluation Criteria
  - Read Before, During and After Completion
  - More Information Later in Presentation

# Section A

- ⦿ Important Information in Section A:
  - Solicitation Number
  - Return Date, Time and Location
  - Number of Copies
- ⦿ Vendor must complete the form as specified on Page L-1 and in Cover Letter.
- ⦿ Original and Copies need **original** signatures

# Section B

## ⦿ Page B1

- First paragraph indicates Geographic Location where the services are to be located.
  - If a vendor proposes more than one site, all required services must be offered at each site.
  - Each proposed site must be in catchment area – even one site out of catchment area=Technically Unacceptable
- Second paragraph lists the maximum and minimum numbers of vendors that may be placed on the BPA.

# Section B

- Project Code
- Required Services
- Estimated Monthly Quantity
- Unit Price

# Section B

- ◎ Project Code and Required Services
  - Project Codes with \* in front of it are listed in two sections in Section C, the National Requirements and Local Services



# Section B

- ⦿ Estimated Monthly Quantity
  - 2019
  - 2020
  - 2021
    - These are federal fiscal years. BPAs will be awarded for FY 2019 and may be extended for two optional years FY 2020 and FY 2021.
- ⦿ EMQs are estimates of the monthly amount of units of service
- ⦿ If multiple vendors are placed on one BPA, the EMQ's are divided between all vendors

# Section B

- ⦿ Estimated Monthly Quantity/Unit Price
- ⦿ These are units of service, not number of clients
  - Units are defined for each project code.
    - For counseling or most face-to-face contacts, one unit equals a 30 minute session. This is important to note the unit definition for each Project Code when you are providing your unit price.
    - Other Project Codes are per test, or per report etc.
    - PC 5020 Psychological Testing and Report has a Not to Exceed (NTE) Amount. Vendor is to provide the maximum cost for a full battery of psychological tests.

# Section B

## ● Unit Price

- Enter a price for each Project Code for each year.
- For services that are subcontracted, mark “S” after the unit price.
- Some project codes such as medication, and lab studies and report, are at actual cost and do not require a unit price.

# Section B

## ⦿ Unit Price

- For Project Code 1010 (Urinalysis Testing) Unit Prices are not to include drug testing supplies or lab costs, with the exception of the purchase of the refractometer.
- Local Needs for PC 1010 includes the requirement that vendors will be required to pick up supplies from nearest branch office

# Section B

- For PC 1504 Breathalyzer, the vendor is responsible for purchasing and maintaining the breathalyzer, as well as for training of staff.

# Section C-Description/Statement of Work

- ⦿ National Mandatory Requirements
  - Begin on Page C-1
  - Describes Services listed in Section B

# Section C

- Each Project Code describes the service and staff qualification requirements.
- For Mental Health, with the exception of PC 5011 and PC 6000, all mental health services are to be conducted by a **licensed practitioner**. (See each PC for exact requirements.)
- PC 5011 and PC 6000 have different requirements, but if the staff is not licensed, both require that the identified staff work under the direct supervision of, or in conjunction with a licensed practitioner.

# Section C

- ◎ Deliverables include Additional Requirements for
  - Records, Conferences, Reports, Emergency Contact Procedures
  - Notifying USPO/USPSO of Defendant/Offender Behavior
  - Staff Requirements and Restrictions
  - Facility
- ◎ Many Requirements regarding the above topics are also included in the Description for each Project Code



# Section C

## Local Services

- Includes Supplemental Requirements to National Requirements specific to our District
- Applies to all Project Codes that have (\*) in front of them in Section B
- May repeat same local services for several services.

# Section C – Sex Offender Local Need

- ◎ Sex Offender Treatment
  - California State Law requires all programs and treatment providers to be certified by the Sex Offender Management Board – Certifications are to be submitted with the proposal

# Sections E, F, G, H and I

- Standardized Sections
- Not going to address specifically unless anyone has questions.

# Section J-Attachments

- Forms provided for vendor to use if awarded BPA
- Department of Labor Wage Determination is mandatory to be provided for vendors providing urinalysis testing

# Section J-Attachments

- ⦿ Monthly Treatment Report (MTR)- Format Must be Used for all BPAs
  - Check Local Services which may require additional pages and information

# Section K

- ⦿ Vendor must complete Section K.
- ⦿ On Page K-1, include all authorized negotiators and staff authorized to sign invoices
- ⦿ An additional sheet can be attached to add authorized negotiators
- ⦿ Once a BPA has been awarded, any changes must be updated through the Fiscal Section and Treatment Services Coordinator

# Section L-Attachments A - D

- This part of presentation highlights some requirements detailed in the instructions in Section L. Rely on the instructions provided in Section L, not on this PowerPoint.

## Section L-Attachment A

### Certification of Compliance Statement

I hereby certify on behalf of \_\_\_ (Name of Offeror or Subcontractor) that \_\_\_ (Name of Offeror or Subcontractor) will provide the mandatory requirements stated in Sections C, E, F and G and all services in strict compliance with requirements, terms, and conditions of the RFP. I understand that failure to perform in accordance with any of the requirements, terms, and/or conditions may result in suspension or discontinuation of referrals or termination of the contract/BPA.



## Section L-Attachment A

### Certification of Compliance Statement

- Vendor is certifying that the program and all staff will meet all requirements for all services listed in the RFP, including local needs.
- Vendor and each proposed subcontractor must submit separate certification statements certifying that they will provide services in compliance with the requirements of the RFP.

## Section L-Attachment A

### Certification of Compliance Statement

- **THIS CERTIFICATION SHALL NOT BE ALTERED IN ANY WAY!!**

- Do not retype
- If wording is altered, proposal will be found to be Technically Unacceptable

## Section L-Attachment B

### Preparation of Background Statement

- Provide all monitoring reports for that service for the previous 18 months for all local, state and federal agencies
  - Letter or certificate would suffice if monitoring report is unavailable
- One of the above must be submitted from all local, state and federal agencies for types of services listed in RFP

## Section L-Attachment B

### Preparation of Background Statement

- To be considered technically acceptable, a vendor must have received ratings of satisfactory or higher.
- Monitoring reports for proposed subcontractors are not required;
- However, on-site evaluations will be individually performed for all subcontractors.

## Section L-Attachment B

### Preparation of Background Statement

- State expressly each location at which the offeror and any proposed subcontractor intend to provide services in response to this solicitation.
- Include copies of all applicable business and/or operating licenses as required by state and local laws and regulations.

## Section L-Attachment B

### Preparation of Background Statement

- Include copies of compliance with all federal, state and local fire, safety and health codes for all sites
- For all of the above, make sure offeror complies with instructions regarding subcontractors.

# Section L-Attachment C

## Preparation of Staff Qualifications

- ⦿ Complete Attachment C for each staff and subcontractors performing services under the resultant BPA
  - For Duties, list project codes/services that staff will provide
  - If multiple sites are being offered, clearly identify which staff will be performing which duties at which site

# Section L-Attachment C

## Preparation of Staff Qualifications

- Under Credentials, list licenses and certifications for each staff as applicable
- Review and complete the Certifications on Attachment C
  - **DO NOT ALTER THE LANGUAGE IN THE CERTIFICATION**



## Section L-Attachment D

### Preparation of Offeror's References

- Provide 3 references for whom offeror has provided services, identified in this RFP, within the past 3 years
- **US Probation Officers or US Pretrial Officers cannot be listed as references**
- Provide current information, especially name of current contact person and phone number. Include phone extensions if applicable.

# Section M

- Proposals will be evaluated to be considered Technically Acceptable using the Pass/Fail criteria listed in Section M.
- Must be able to answer all questions: “Yes”
- Any “No” response, even one “No” response, will result in the proposal being considered technically unacceptable
- **MAKE SURE ALL REQUIREMENTS LISTED IN SECTION M ARE ADDRESSED!!**

# Section M

- ⦿ The review of the criteria shall be based on the Offeror's Technical Proposal, which contains the Offeror's Certification of Compliance, Offeror's Background Statement, the Offerors Staff Qualifications, and the Offeror's References.
  - Each of these shall demonstrate how the offeror will perform/meet the requirements of the RFP.

# Section M

- ◎ On site visits are conducted for proposals which are technically acceptable and lowest bid
  - They are conducted to verify that the offeror's facility complies with the requirements of the RFP
  - There will be on-site visits for all subcontractors providing services

# Page M-4 – Evaluation of Price

- ⦿ For each Project Code, EMQs are multiplied by 12 to get a Yearly Quantity.
- ⦿ The Yearly Quantity is multiplied by the Unit Price provided by the offeror to obtain a Life of Agreement Cost
- ⦿ These are added together to obtain total Life of Agreement cost for all three years.

# Awarding of BPAs

- BPAs will be awarded to vendors who submitted proposals that are technically acceptable and lowest bid
- If more than one vendor is placed on the BPA it will be awarded to the next technically acceptable lowest bid etc.

# Summary

- Vendors are to complete and submit:
  - Section A-Solicitation/Offer/Acceptance Form, AO 367
  - Section B-Submission of Prices
    - Provide Prices
    - Acceptable Responses
      - a. Unit Price
      - b. “N/C”=No Charge
      - c. Indicate if Subcontracting
      - d. Prices and “No Shows” – no separate charge for no-shows; included in unit price
  - Section K- Representations, Certifications, and Other Statements of Offeror.
  - Attachment A through D

**\*\*Note: The offeror is not required to submit solicitation sections C, D, E, F, G, H, I, as part of its proposal.**

# Summary-Continued

- ⦿ **Vendors only need to submit sections that require that they provide information or fill out information.**
- ⦿ **Vendors must submit Sections A, B, K, & attachments A through D, and submit any of the other information and documentation called out in Section L and C.**
- ⦿ Do not submit proposals in binders or notebooks. They are to be unbound. Clips or rubber bands work best.



# Summary:

- Read, Reread and Reread all instructions and sections very carefully
- Follow instructions detailed in Cover Letter and Section L
- Include a unit price for all project codes for all 3 years where a bid price is required

To conclude:

Make Sure that All Requirements  
Listed in Section M are  
Addressed



# For More Information

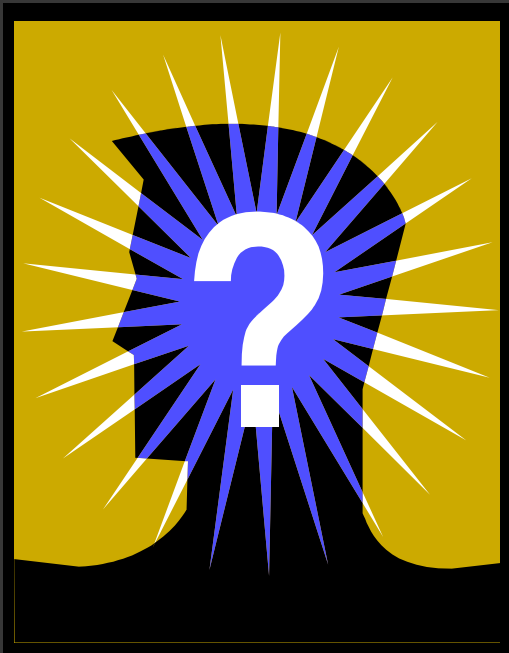
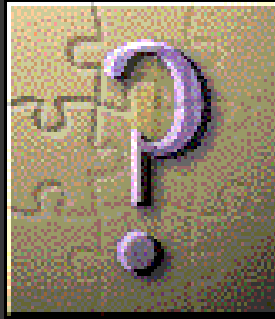
- Check Website:

<http://www.cacp.uscourts.gov/treatment-services-vendor-information>

- Questions and Answers from Bidders' Conference will be posted. Keep checking in case there are further questions and answers.

- This PowerPoint and Webex will be posted as well.

# Q and A



Thanks for your attention and interest in providing treatment services to Federal Defendants and Offenders.

