**STATE OF CALIFORNIA DEPARTMENT OF REHABILITATION**

**INDEPENDENT LIVING AND**

**ASSISTIVE TECHNOLOGY SECTION**

SYSTEMS CHANGE NETWORK HUB PROGRAM

**REHABILITATION ACT TITLE Vll-B**

**REQUEST FOR APPLICATIONS**

**RFA IL-24-02**

**INDEPENDENT LIVING AND ASSISTIVE TECHNOLOGY SECTION**

**Systems Change Network Hub Program**

**REQUEST FOR APPLICATIONS (RFA) IL-24-02**

[REQUEST FOR APPLICATIONS (RFA) IL-24-02 4](#_bookmark0)

1. [AUTHORITY 4](#_bookmark1)
2. [BACKGROUND 4](#_bookmark2)
3. [KEY ACTION DATES 8](#_bookmark3)
   1. [Submitting Questions 8](#_bookmark4)
   2. [Bidders’ Conference 8](#_bookmark5)
   3. [Application Package Due 9](#_bookmark6)
   4. [Application Evaluation 9](#_bookmark7)
   5. [Notice of Intent to Award 9](#_bookmark8)
4. [PURPOSE AND OVERVIEW OF THIS RFA 9](#_bookmark9)
5. [ELIGIBILITY TO APPLY 10](#_bookmark10)
6. [DESCRIPTION OF SERVICES AND OBLIGATIONS 11](#_bookmark11)
   1. [Statewide Systems Change Community Organizing and Education 11](#_bookmark12)
   2. [Community Organizing Training and Technical Assistance 12](#_bookmark13)
7. [SUBMITTAL OF APPLICATIONS 14](#_bookmark14)
8. [APPLICATION REQUIREMENTS 15](#_bookmark14)
   1. [General Requirements 16](#_bookmark18)
   2. [Organization of Application and Required Documents 16](#_bookmark19)
9. [REVIEW PROCESS AND CRITERA 15](#_bookmark17)
   1. [Disposition of Applications 18](#_bookmark18)
   2. [Administrative Review 18](#_bookmark19)
   3. [Evaluation 19](#_bookmark20)
   4. [Notice of Intent to Award 19](#_bookmark21)
   5. [Applicant Appeals 20](#_bookmark22)
   6. [Execution and Performance 21](#_bookmark23)
10. [ADDITIONAL PROVISIONS 22](#_bookmark24)
    1. [Insurance 22](#_bookmark25)
    2. [Debarment, Suspension, and Non-procurement 25](#_bookmark26)
    3. [Prohibition on Tax Delinquency 25](#_bookmark27)
11. [NARRATIVE AND BUDGET AND STAFFING PLAN………………………………27](#_bookmark28)

A. NARRATIVE……………………………………………………………………………27

B. BUDGET AND STAFFING PLAN……………………………………………………31

[ATTACHMENT 1: REQUIRED DOCUMENT CHECKLIST 33](#_bookmark29)

[ATTACHMENT 2: COVER SHEET AND ASSURANCES 35](#_bookmark30)

[ATTACHMENT 2: COVER SHEET AND ASSURANCES PAGE 2 36](#_bookmark31)

[ATTACHMENT 2: COVER SHEET AND ASSURANCES PAGE 3 37](#_bookmark32)

[ATTACHMENT 3: SAMPLE OF SECRETARY OF STATE ORGANIZATIONS ANNUAL CORPORATE REPORT 38](#_bookmark33)

[ATTACHMENT 4: SAMPLE ENTITY STATUS LETTER FROM CA FRANCHISE TAX BOARD 39](#_bookmark34)

[ATTACHMENT 5: SAMPLE OF NON-PROFIT STATUS LETTER FROM THE IRS 40](#_bookmark35)

[ATTACHMENT 6:](#_bookmark36)  [SAMPLE OF PROOF OF INSURANCE COVERAGE 41](#_bookmark36)

[ATTACHMENT 7: EVALUATION](#_bookmark37) AND SCORING  [42](#_bookmark37)

ATTACHMENT 8: SAMPLE OF BUDGET NARRATIVE………………………………..63

ATTACHMENT 9: RFA SERVICE BUDGET SPREADSHEET…………………………65

**INDEPENDENT LIVING AND ASSISTIVE TECHNOLOGY SECTION**

**SYSTEMS CHANGE NETWORK HUB**

## REQUEST FOR APPLICATIONS (RFA) IL-24-02

## AUTHORITY

Under the authority of Title VIIB, section 713 of the Rehabilitation Act of 1973, the 2025-2027 [State Plan for Independent Living (SPIL)](https://calsilc.ca.gov/state-plan-for-independent-living/) sets forth goals and objectives for the development of independent living (IL) services in California. The SPIL indicates the commitment of the State Independent Living Council (SILC) and the California Department of Rehabilitation (DOR) to fund a not-for-profit organization to function as the Systems Change Network Hub to provide guidance to the State's Independent Living Network for coordinating policy education on issues that impact the lives of Californians with disabilities.

## BACKGROUND

The DOR, through its Independent Living and Assistive Technology Section (ILATS), announces the availability of federal grant funds as authorized under the Rehabilitation Act and SPIL. This Request for Applications (RFA) is made available to qualified non-profit service providers for the purpose of carrying out the statewide Systems Change Network Hub program that supports systems change and community organizing efforts to improve independent living for persons with disabilities.

The term of this grant will be February 1, 2025, or upon approval (whichever is later) through September 30, 2027. At DOR’s discretion the grant may be amended for an additional two (2), one (1) year extensions under the same terms and conditions. The determination to extend the grant may be based on expenditures, program performance, reporting, SPIL goals and objectives, and availability of funding. This program is funded through an annual Rehabilitation Act, Title VIIB, appropriation of $350,000 with a limit of one awardee.

The Systems Change Network is a program to provide statewide collaborations of organizations and individuals, including all Independent Living Centers (ILCs) members. ILCs are required to have no less than one (1) full time employee (1 FTE) dedicated to the Community Organizing / Systems Advocacy program. Systems Change staff are required to conduct local or statewide community organizing with ILC staff, board members, volunteers, consumers, and stakeholders. Systems Change staff are encouraged to coordinate with the Systems Change Network Statewide Hub.

The not-for-profit organization awarded through this RFA will be referred to as "Network Hub" and will provide program coordination and support for the Systems Change Network members, as they independently and collectively conduct community organizing and coalition building, advocacy, and education. The Network Hub will conduct leadership development activities to support participation of Systems Change Network members, community members, and stakeholders in statewide disability public policy education and development.

The Network Hub and Systems Change Network members are to emphasize outreach and community organizing to solicit participation, develop leaders and build coalitions in the disability and independent living communities. The Network Hub should seek out a wide range of individual and organizational stakeholders and prioritize outreach to under-represented groups of persons with disabilities regarding system and policy changes that will impact them and for which they have opportunity to comment and provide input.

The mission of the California 2025-2027 SPIL is “To partner with stakeholders to advocate for and provide services that promote equity for individuals with disabilities”. The systems change goals and objectives in the SPIL include:

Goal - In addition to direct services, Californians with disabilities will continue to benefit from systems change advocacy that results in systemic changes that increase access to public and private resources that enhance independence.

Objective - The California Independent Living Network receives effective and supportive (a) representation at Statewide venues and/or on prioritized Statewide advocacy issues, and (b) infrastructure and technical assistance regarding multi-catchment communications, efforts, and activities that support Systems Change.

Objective - The SILC will direct the Systems Change hub contractor to conduct no less than two (2) virtual public forums in partnership with stakeholder groups to identify disparities and inequities in community living focused on unmet needs in home and community-based services (HCBS) programs. These forums will also gather any best or promising practices that may have improved access to HCBS.

Objective - The Systems Change Network Hub contractor will develop a series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.

Goal - White paper on HCBS developed which highlights the disparities in California as well as identifies possible solutions. This will be presented to the SILC at a full council meeting.

Objective - The Systems Change Network Hub contractor will develop a white paper.

The final goals and objectives related to this grant may be modified subject to final SPIL approval or amendments.

The Network Hub will organize and support members of the Systems Change Network to assist in the pursuit of this mission and these goals and objectives.

The Systems Change Network Hub provides members with technical assistance, training, and support on local and statewide community organizing principles and topics. Through community organizing, members of the Systems Change Network Hub will develop plans and conduct activities to ensure local or regional policies such as housing, transportation, long-term services and supports (LTSS), HCBS, and service delivery systems are responsive to the needs of people with disabilities. States and local jurisdictions are undergoing systemic changes to modernize service delivery systems. This system change creates an opportunity to ensure these initiatives, policies and procedures are implemented in a way that is responsive to the individuals it is designed to serve. This creates an opportunity for advocacy and community organizing to ensure local and statewide initiatives are designed and implemented to support independent living. For the initiative to be successful, community input is needed.

The state has been working to improve the health and well-being of all Californians, especially those with disabilities, by transforming the health and human services system through numerous statewide initiatives such as:

* Behavioral Health (BH) System Reform: This includes modernizing our behavioral health system to provide services to help anybody, anywhere, anytime including changing the way counties are reimbursed for specialty mental health and drug services provided by Medi-Cal.
* Healthcare Reform: California Advancing and Innovating Medi-Cal (CalAIM) transforms Medi-Cal by enhancing care coordination, addressing social determinants of health, expanding preventive and home-based services, and reducing health disparities through whole person and person-centered healthcare services.
* Master Plan for Aging (MPA): The MPA prepares the state for the growth and diversity of its aging population by 2030 including for adults with disabilities.
* Master Plan for Developmental Disabilities (MPDD): This plan will create the road map to modernize and improve the decades old system that delivers critical developmental services to hundreds of thousands of Californians.
* Master Plan for Career Development (MPCD): This initiative aligns education, workforce, and economic development systems to meet the current and future needs of California’s economy and workers.
* Long-Term Services and Supports Integration (LTSS) Reform: This includes multiple initiatives aimed at changing how services are delivered across systems to better meet the needs and preferences of older adults, people with disabilities, and their caregivers.
* Home and Community Based Services (HCBS): This includes a wide variety of types of person-centered care delivered in the home and community. HCBS programs address the needs of people with functional limitations who need assistance with everyday activities.
* Aging & Disability Resource Connection (ADRC): This systems change initiative is creating an opportunity to modernize how services are delivered and how people with disabilities, older adults, family members, and caregivers access services through information and assistance for local resources for LTSS.
* Elimination of the subminimum wage: This initiative phases out the practice of paying workers with disabilities less than the minimum wage in the state of California by 2025 and prohibits new special licenses for such employers after 2022. This promotes fair and equal pay, dignity, and inclusion for workers with disabilities, increases their economic security and housing affordability.
* Homelessness and Housing access: One of California’s priorities is to increase the supply and availability of affordable housing and to prevent evictions and foreclosures. The state has allocated billions of dollars to fund various housing and homelessness programs to improve how individuals access support.

The state is engaging Californians with disabilities to ensure they have a voice and choice in the decisions that affect their lives, and that they have access to the services they need. This RFA solicitation seeks to address these types of statewide initiatives in a way that results in systemic change that increases access to public and private resources that enhances independence.

## KEY ACTION DATES

The DOR will make every effort to adhere to the following schedule. If necessary, applicants will be notified of changes to the Key Action Dates in the form of an addendum that will be posted to the DOR website.

|  |  |  |
| --- | --- | --- |
| **Action** | **Responsibility** | **Date** |
| RFA available to prospective applicants | DOR | August 30, 2024 |
| Deadline to submit written questions | Applicants | September 12, 2024  by 5:00 p.m. |
| Bidders’ Conference | DOR, Applicants | September 19, 2024, at 1:00 p.m. |
| Addendum (questions and answers) posted to DOR website | DOR | September 25, 2024 |
| Application package due | Applicants | October 2, 2024  by 5:00 p.m. |
| Application screening and evaluation | Administrative Screening | October 3, 2024 –October 10, 2024 |
| Evaluation Panel & Technical Review | October 11, 2024 – October 25, 2024 |
| Executive Review & Approval | October 28, 2024 – November 5, 2024 |
| Notice of Intent to Award | DOR | November 7, 2024 |
| Last date to file appeal | Applicants | December 7, 2024 |
| Last date to respond to appeals | DOR, Applicants | January 6, 2025 |
| Anticipated Grant period | DOR, Applicants | February 1, 2025, or upon approval, whichever is later through September 30,  2027 |

1. Submitting Questions

All questions regarding the RFA must be submitted in writing to [contractsinfo@dor.ca.gov](mailto:contractsinfo@dor.ca.gov). All questions submitted must use the subject line: RFA **IL-24-02** Systems Change Network Hub Grant.

1. Bidders’ Conference
   * 1. A Bidders’ Conference will be held to address questions submitted to the DOR, and to provide additional clarity, if required. Additional questions will also be addressed at this time. Attendance at the Bidders’ Conference is highly encouraged but NOT mandatory.
     2. All questions and answers discussed during the Bidders’ Conference will be posted on the DOR’s [website](https://www.dor.ca.gov/Home/ContractGrantSolicitations) in the form of an addendum.
     3. The Bidders’ Conference will take place through video conference:

### Bidders’ Conference

Date: September 19, 2024

Time: 1:00 P.M. Pacific Time

Register in advance for this meeting: <https://dor-ca-gov.zoom.us/meeting/register/tZUufu2orT0oHdHq9gIwBcWsJcCpbNMVOPhs>

If disability-related accommodations are required for your participation in the Bidders’ Conference, please contact Scott Schmidt at [Scott.Schmidt@dor.ca.gov](mailto:Scott.Schmidt@dor.ca.gov) no less than 3 business days before the meeting. After that deadline the DOR will make every effort to meet accessibility needs but cannot guarantee to do so.

1. Application Package Due

Application packages are due to the DOR no later than 5:00 pm PT on Wednesday, October 2, 2024. Application packages received after this deadline will be disqualified.

1. Application Evaluation

The screening and evaluation of applications will be performed by a qualified, knowledgeable Evaluation Panel.

1. Notice of Intent to Award

A Notice of Intent to Award will be posted to the DOR website for 30 days. Following the proposed award period, the DOR will send the successful applicants a grant package for review and signature with a date by which to respond. If terms cannot be reached within the time specified, the DOR reserves the right to finalize a grant with the next most qualified applicant, without undertaking a new procurement process or canceling the award.

## PURPOSE AND OVERVIEW OF THIS RFA

The following provides a general overview of information related to the subject of this RFA.

The RFA seeks an experienced and qualified non-profit organization to provide directly, or by arrangement, all the Systems Change goals and objectives as identified in the 2025-2027 SPIL and as outlined in the RFA.

The private not-for-profit organization awarded funding will be charged with administering the Systems Change Network Hub program that funds the maintenance, coordination, and continued development of an existing systems change network focused on independent living issues affecting persons with disabilities.

One grant of up to $934,000 over a 32-month period will be awarded to a single private, not-for-profit organization, starting February 1, 2025, or upon approval whichever date is later, through September 30, 2027. The amounts listed may be subject to change based on the SPIL’s final allocation. At the DOR’s discretion, the grant may be extended for an additional two (2), one (1) year periods under the same terms and conditions, not to exceed two (2), one (1) year extensions or five (5) year’s total.

February 1, 2025, to September 30, 2025, funding is $234,000.

October 1, 2025, to September 30, 2026, funding is $350,000.

October 1, 2026, to September 30, 2027, funding is $350,000.

1. **ELIGIBILITY TO APPLY**
2. Organizations must have a commitment to independent living philosophy, involvement in supporting systemic changes that improve community-based living options, and experience with engaging people with disabilities in planning and conducting these efforts.
3. Organizations must have a commitment that the majority of personnel funded under this grant will be people with disabilities.
4. Organizations must have a commitment that activities proposed for funding under this RFA will support and benefit a broad range of persons with various disabilities, including those who are underrepresented, without focus on persons from a single disability group or issues that primarily pertain to them.
5. Organizations must engage in statewide systems change initiatives and be able to work with the network of 28 ILCs throughout the state.
6. Applicants must currently be a 501(c)(3) non-profit organization.

## DESCRIPTION OF SERVICES AND OBLIGATIONS

DOR and the State Independent Living Council (SILC) have designated this RFA to fund one private, not-for-profit organization to interact and be named the "Network Hub" with the Independent Living/Systems Change Network members, stakeholders, and consumers. The Network Hub will maintain close, active working relationships statewide to coordinate and organize activities; provide technical assistance and support; build capacity; increase effectiveness and influence; and promote increased participation by the Independent Living and disability community.

1. **Statewide Systems Change Community Organizing and Education**

Applicants must identify and support at-least one transformational statewide initiative, the Network Hub will support members to develop local priorities, plans, and conduct community organizing activities to ensure local policies are supportive of individuals with disabilities such as: behavioral health, healthcare, MPA, MPDD, MCPD, LTSS, ADRC, elimination of sub-minimum wage, homeless and housing, or other statewide initiatives for advocacy and community organizing to support the integration of people with disabilities into systems reform and modernization.

The Systems Change contractor will support the work of the ILC Systems Change Advocates and will increase representation at statewide venues and/or on prioritized statewide advocacy issues, and (b) their infrastructure and technical assistance regarding multi-catchment communications, efforts, and activities supporting systems change.

The statewide initiative selected should also be one that is addressed at/to statewide forums (e.g., California Public Utilities Commission (CPUC) Telecommunications Access for the Deaf and Disabled Administrative Committee (TADDAC), ADRC Advisory Committee, Disability and Aging Community Living Advisory Committee , Master Plan on Aging Committees, Master Plan on Career Development forums, Master Plan on Developmental Disability forums, SILC, Disaster Coordination Committees, LTSS and disability advisory boards convened by the State). The Network Hub will inform the Systems Change network of opportunities to provide systems change advocacy regarding such issues to policymakers. The Network Hub should avoid issues specific to only one county or ILC catchment area, unless the issue may serve as precedence for a statewide issue. Whenever possible, when representing the Systems Change network, the Network Hub will promote the network's consensus or majority opinion. The Systems Change hub contractor will conduct at-least two (2) virtual public forums in partnership with stakeholder groups to identify disparities and inequities in community living focused on unmet needs in HCBS and LTSS programs. These forums will also gather any best or promising practices that will improve access to HCBS and LTSS.

The Systems Change Network Hub contractor will facilitate public forums and will develop a series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS and LTSS.

The Systems Change Network Hub contractor will develop at-least one white paper on HCBS and LTSS which highlights the disparities in California as well as identifies possible solutions. The white paper will be presented to the SILC at a full council meeting.

1. **Community Organizing Training and Technical Assistance**

The Network Hub is expected to provide the following in support of the current SPIL mission, goals and objectives:

* Education and training; including apprising the network of emerging Statewide and multi-catchment issues and developments likely to impact disability rights and/or the ability to live independently. This includes development of policy education fact sheets, issue briefs and papers, and training on systems change and community organizing issues;
* Technical assistance including how to coordinate Statewide or multi-catchment activities, communications, and decision-making. The Hub will provide guidance to advocates to be consistent with abiding of federal and state laws consistent with the bylaws pertaining to advocacy versus lobbying. It will not be adopting or rejecting any position on an issue;
* Network coordination through providing infrastructure and coordination regarding cross-catchment communications (e.g., listserv, conference calls) and activities (e.g., Disability Capitol Action Day);
* Community and statewide organizing; community organizing will not be construed as an end in and of itself but, rather, will be construed as a means by which concrete systemic change may be affected;
* Systemic advocacy, including an annual meeting or survey of the ILC Advocates to identify Statewide issues for each year of the SPIL cycle;
* Tracking and reporting on community-based priorities, activities, and measurable outcomes including how many individuals participate in events, number of individuals trained, total number organized annually, and what systems changes resulted
* Documentation and dissemination of successful local strategies and practices of community organizing and/or systems change initiatives;
* Statewide and local systems change planning and implementation;
* Collection and dissemination of information of state and local activities;
* Outreach and recruiting;
* Leadership development;
* Guidance for coordinating policy education at local, state, and federal levels;
* Building coalitions and alliances with the IL, disability, multi-cultural, and other communities around disability policy issues;
* Maintaining, developing, and expanding the Network's capacity to meet community education and system change goals outlined in the SPIL
* Guidance for coordinating policy education at local, state, and federal levels; and,
* Maintaining, developing, and expanding the Network's capacity to meet community education and system change goals outlined in the SPIL. All contract deliverables and outcomes will be measurable and attributable to the activities of the Network Hub.

## SUBMITTAL OF APPLICATIONS

To be considered for funding, applications must comply with the instructions and criteria given.

* 1. Accessibility

Narrative sections A 1-7 includes: 1. Organization Description, 2. Organization Experience, 3. Assessment of Needs, 4. Network Hub Organization Structure, 5. Proposed Work Plan, 6. Project Outcomes and Objectives, 7. Evaluation, which are used for scoring, must be in accessible formats with a maximum of 30 pages. Further information on making documents accessible is available at the following website: [California Department of Rehabilitation - Resources for](https://dor.ca.gov/Home/DocumentAccessibility) [Creating Accessible Content.](https://dor.ca.gov/Home/DocumentAccessibility) This requirement applies to all workplans submitted in either printed or electronic formats. Workplans submitted in a non-accessible format will be considered incomplete and disqualified.

* 1. Submission Information

Application packages are due to DOR no later than 5:00pm PT on October 2, 2024.

* + 1. Applications may be submitted in one of the following formats:

Option 1: Electronic Submissions (Preferred)

Electronic submissions must be received by [contractsinfo@dor.ca.gov](mailto:contractsinfo@dor.ca.gov) before the date and time specified above. Electronic submissions must contain all documents and attachments listed in this RFA to be considered responsive. All documents must be in a printable and searchable format and may not be password protected. All electronic submissions should use the subject line: RFA IL-24-02 Systems Change Network Hub Grant. Applications submitted by email will not be opened until the deadline has passed.

Option 2: Mailed Submissions

1. One original and one copy of the application must be mailed in a sealed envelope and be received by DOR before the date and time the application is due.
2. The original application must be marked "ORIGINAL." All documents contained in the original application package must have original signatures and must be signed by a person who is authorized to bind the proposing organization. The second application set may be a photocopy of the original package.
3. The application envelope must be plainly marked with the RFA number and title, the applicant organization’s name, and "DO NOT OPEN," as shown in the following example:

Department of Rehabilitation RFA IL-24-02

Applicant Organization’s Name DO NOT OPEN

Mail applications (U.S. Postal Service Deliveries, UPS, Express Mail, or Federal Express) to the following address:

Department of Rehabilitation RFA IL-24-02

Contracts and Procurement

Attention: (add analyst name) 721 Capitol Mall, 6th Floor Sacramento, CA 95814

DO NOT OPEN

1. Applications not submitted in a sealed envelope and marked as indicated above will be disqualified.
2. Additionally, an electronic copy of the application must be emailed to [contractsinfo@dor.ca.gov](mailto:contractsinfo@dor.ca.gov) before the date and time the application is due. Electronic applications must contain all documents and attachments listed herein to be considered responsive. All documents must be in a printable format and may not be password protected. All electronic applications should use the subject line: RFA IL-24-02 Systems Change Network Hub Grant. The electronic copy of the applications submitted by email will not be opened until the deadline has passed.
   * 1. Application packages delivered by fax will not be accepted.
     2. Applications containing modifications to the terms of this RFA, or that contain inaccurate, or missing information will be grounds for application disqualification.
     3. Late Submittals

Applications received after the specified date and time are considered late and will not be accepted. Any application received after the specified time will not be considered or reviewed by the DOR.

## APPLICATION REQUIREMENTS

The following summarizes the content and organization of the application package. Omissions, inaccuracies, or misstatements may be sufficient cause for rejection of an application.

* 1. General Requirements
     1. Applications must be typewritten, and if submitted by mail, must be manually signed. Forms and certifications may be completed in ink, though providing typewritten forms and certifications is preferred. All documents contained in a mailed submission must have original signatures and must be signed by a person who is authorized to bind the applicant organization. Electronic submissions may contain manually signed and scanned documents or certified electronic signatures furnished by an individual authorized to bind the applicant organization.
     2. Documents must be prepared in a single-spaced type, 14-point Arial font, on 8

½” x 11” sheets with 1” margins. Under this RFA, a page is defined as a single side of an 8 ½” x 11” sheet.

Pages must be numbered to show the page numbers and total number of pages in response; (e.g., Page 1 of 30, Page 2 of 30, etc.). Pages must be numbered at the bottom of the page.

* 1. Organization of Application and Required Documents

1. Table of Contents

The table of contents must contain a list of all sections of the application with corresponding page numbers.

1. Required Document Checklist

The Required Document Checklist details all documents that must be included for an application to be considered responsive. Applications submitted without a completed Required Document Checklist will be considered incomplete and disqualified.

1. Cover Sheet and Assurances

Applications must contain Attachment 2, Cover Sheet and Assurances, which must be signed by an official authorized to bind the applicant contractually and

provide the names, titles, addresses, telephone numbers, and email addresses of individuals authorized to negotiate and contractually bind the applicant.

By signing the Cover Sheet and Assurances, the applicant affirms the following:

1. The application is complete and accurate.
2. The applicant, its principals, and/or subcontractors, are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
3. The applicant, its principals, and/or subcontractors, are not presently on either list: Franchise Tax Board ([Delinquent Taxpayers](https://www.ftb.ca.gov/about-ftb/newsroom/top-500-past-due-balances/index.html)), or the California Department of Tax and Fee Administration ([CDTFA Sales & Use Tax](https://www.cdtfa.ca.gov/taxes-and-fees/sutprograms.htm) [Delinquencies](https://www.cdtfa.ca.gov/taxes-and-fees/sutprograms.htm)).

The applicant must also include the following:

1. Copy of organization's articles of incorporation.
2. Copy of organization’s bylaws.
3. Copy of organization’s annual corporate report, filed with the California Secretary of State for all organizations who have completed one (1) year of fiscal operation, which can be found at <https://businesssearch.sos.ca.gov/>.
4. Copy of an “entity status” letter issued by the California Franchise Tax Board indicating non-profit status.
5. Copy of non-profit status letter from the Internal Revenue Service
6. Insurance
   1. Commercial General Liability Insurance.
   2. Workers’ Compensation Insurance.
   3. Professional liability insurance (if applicable).
   4. Automobile Insurance (If applicable).
7. Application Narrative

The Application Narrative must be in written format and should be a clear and comprehensive document detailing how the organization will carry forth the services outline in this RFA.

The Application Narrative will become the Scope of Work for the grant, if awarded.

The Application Narrative must not exceed 30 pages combined and consist of seven sections: Section 1: Organization Description, Section 2: Organizational Experience, Section 3: Assessment Needs, Section 4: Network Hub Organization Structure, Section 5: Proposed Work Plan, Section 6: Projected Outcomes and Objectives, and Section 7: Evaluation. Applicants are encouraged to submit the Application Narrative divided into these seven specific sections.

1. Budget

The applicant must provide proposed budget expenditures, made available through this grant, by line item in narrative form including but not limited to the following categories: personnel, operating expenses and equipment. Budget expenditures should clearly align with the activities described in the narrative and should have a logical purpose in support of the intended outcomes described in the narrative.

Applications that propose the use of subcontractors or consortium partners in this RFA are required to include a detailed plan on the solicitation and selection process as well as the plan for management and evaluation of partners’ activities. Page limit does not apply to the budget narrative.

## REVIEW PROCESS AND CRITERIA

* 1. Disposition of Applications

All written correspondence, exhibits, photographs, reports, printed material, tapes, electronic disks, and other graphic and visual aids submitted to the DOR during this process, including as part of a response to this RFA are, the property of the DOR and are subject to the Open Government Laws. Collectively, the California Public Records Act (Government Code sections 6250, et seq.), the Bagley-Keene Open Meeting Act (Gov. Code section 11120 et seq.), and the Freedom of Information Act (FOIA) (5 U.S.C. section 552, as amended by Public Law No. 104-231, 110 Stat. 3048) comprise the Open Government Laws.

* 1. Administrative Review
     1. The Administrative Review is completed to ensure that applications conform to all RFA requirements. This review is completed on a pass/fail basis.
     2. Applications received by the deadline, will be opened, reviewed, and evaluated for completeness with the contents of each application compared to the Required Document Checklist. Applications missing required items, including the Required Document Checklist, will be considered incomplete and disqualified.
  2. Evaluation
     1. Evaluation of applications must be completed by the DOR’s Evaluation Panel, which must be comprised of qualified individuals who are knowledgeable about the services requested.
     2. Evaluations must be completed in accordance with the scoring criteria contained within this RFA.
     3. The DOR intends to award one grant under this RFA; however, the DOR reserves the right to reject all applications and is under no obligation to enter into a grant as a result of this request.
     4. An application must receive a minimum score of 60 points to be considered for funding.
     5. In the event of a tie, when all factors are considered equal, a coin toss will be used to determine which of the tied applicants receive the award. The applicants involved will be given an opportunity to attend the coin toss either in person or via teleconference. The coin toss will be witnessed by at least three persons.

Prior to the coin being tossed, the applicant who submitted their grant application package by email to the DOR first will call “heads” or “tails,” indicating which side of the coin that party is choosing. The other party will be assigned the opposite side. During the coin toss, the coin will be thrown in the air such that it rotates edge-over-edge several times, and the coin will be allowed to land on the ground or any other surface without being caught.

When the coin comes to rest, the toss is complete and the party who called correctly or was assigned the upper side of the coin will be declared the winner.

If the coin lands on its side, against an object, or becomes stuck in such a manner that the coin rests upon its edge, the coin will be re-flipped.

Should multiple applicants be tied for award, one coin will be tossed for each applicant, with each choosing “heads” or “tails” for their own coin, until only one applicant remains. If all applicants miscall a toss, and there is no apparent winner, the round will be re-tossed.

* 1. Notice of Intent to Award
     1. Upon completion of the review and evaluations of the applications, the DOR will award one grant to the highest-scoring qualified applicant.
     2. Upon identification of proposed awardee, a Notice of Intent to Award will be posted to the DOR website prior to the award of a grant.
     3. Following the 30-day proposed award period, in the absence of an appeal, the DOR will send the successful applicants grant packages for review and signature with a date by which the grant package must be returned.
     4. If terms cannot be reached within the specified timeframe, or should a successful applicant refuse award, the DOR reserves the right to finalize a grant with the next qualified applicant without undertaking a new procurement process or cancelling the award.
  2. Applicant Appeals

The California Code of Regulations, Title 9 Section 7334(d) provides for appeal rights for awards. Any applicant for a grant who is dissatisfied with the decision of the DOR relative to an application for or discontinuation of grant funding may request a review by the DOR. The request for review must be in writing and must:

* + 1. Clearly identify all issues in dispute,
    2. Contain a full statement of the potential grantee’s position with respect to each issue, and
    3. Contain pertinent facts and reasons in support of the potential grantee’s position and the action requested.

The written request must be submitted to the DOR within 30 days of the date of the Notice of Intent to Award via email to [contractsinfo@dor.ca.gov](mailto:contractsinfo@dor.ca.gov). DOR Contracts and Procurement staff will acknowledge receipt via email.

The Grant Review Committee will be appointed by the Chief Deputy Director and will consist of up to three DOR employees, selected at the Chief Deputy Director's discretion. The Grant Review Committee will:

1. Send a notification letter to the appellant, program staff, and any intended grantee whose grant award could be affected by the appeal. The letter will include the following:
   1. The names, titles and qualifications of the individuals on the Grant Review Committee;
   2. The method for communicating with the Grant Review Committee (e.g., submission by email only, appointing a single contact person, requiring that parties copy each other on all communication with the Grant Review Committee);
   3. Notice that intended grantees may also respond to the appeal in writing to the Grant Review Committee;
   4. The deadline by which information will be submitted to the Grant Review Committee in relation to the appeal;
   5. The information and documents on which the Grant Review Committee will base its decision, including the RFA and any documents submitted for review;
   6. The date on which the Grant Review Committee’s decision will be issued;
   7. A copy of the appeal submitted;
   8. A statement notifying all parties that the decision of the Grant Review Committee is final under California Code of Regulations, title 9, section 7334(d)(3).
2. Review the appeal, any responses to the appeal by DOR Program and affected applicants, and the RFA. Depending on the issues raised in the appeal, the Grant Review Committee may also review the Grant Solicitation Manual, applications of relevant parties, evaluator bios, resumes, scoresheets, scoring guidelines, the documents and evidence presented, and documents related to the RFA as needed. The Grant Review Committee’s decision is limited to the issues raised and documents presented in the appeal.
3. After reviewing the appeal, response and related information, the Grant Review Committee will make its decision. The Grant Review Committee may take actions that could include upholding the grant award in the Notice of Intent to award, making a determination that applications should be re-scored by a new evaluation panel, or rescoring the applications themselves. The new score resulting from the new evaluation panel may be appealed. If the Grant Review Committee rescores the applications themselves, the new scores will be the Grant Review Committee’s final decision and may not be appealed.
4. The Grant Review Committee will notify the appellant, in writing, of the decision of the committee within 30 days of the date of the potential grantee’s appeal request is received by DOR. The Grant Review Committee will document the reasoning behind its decision. The Grant Review Committee will notify all affected parties of its decision in writing. The decision of the Grant Review Committee is final.
   1. Execution and Performance

No grant between the DOR and a successful applicant is in effect until the grant is signed by the successful applicant and the DOR.

Upon execution, the Grantee must start providing the services under its grant within 30 calendar days, or on the express date mutually agreed upon by the DOR and the Grantee. Should a Grantee fail to start work within this timeframe, DOR reserves the right to terminate the grant. Notice of termination will be provided to the Grantee after the start work period and allow for the Grantee to have five business days to start work. Failure to start work will result in the termination of the grant.

## ADDITIONAL PROVISIONS

The following requirements must be made part of any grant awarded as a result of this RFA, and it is the sole responsibility of the Grantee to ensure full compliance to these requirements throughout the term of their grant. To access the full provisions, please select Systems Change Network Hub Grant Provisions in the following link: [Systems Change Network Hub Provisions](mailto:https://dor.ca.gov/Home/IndependentLiving).

* 1. Insurance

Without limiting the Grantee’s indemnification obligations to the DOR, and prior to commencement of work, the Grantee must obtain, provide, and maintain at its own expense during the term of the grant, policies of insurance of the type, amounts, and in a form satisfactory to the DOR.

* + 1. Proof of Insurance

The Grantee must provide certificates of insurance to the DOR as evidence of the insurance coverage required, along with all specified endorsements required by the DOR. All insurance policies, certificates, and endorsements must be approved by the DOR prior to commencement of work. Current certification of insurance must be kept on file with the DOR at all times during the term of the Grant. The DOR reserves the right to require complete, certified copies of all required insurance policies, at any time.

* + 1. Duration of Coverage

The Grantee must procure and maintain, for the duration of the Grant, insurance against claims for injuries to persons or damage to property, which may arise from or in connection with the performance of the work hereunder by the Grantee, its agents, representatives, employees, or subcontractors/subconsultants. The Grantee agrees to maintain all applicable insurance, for a period of no less than three years after completion of the work.

* + 1. DOR’s Rights of Enforcement

In the event that any policy of insurance required under this Grant does not comply with these specifications or is canceled and not replaced, the DOR has the right, but not the duty, to obtain the insurance it deems necessary and any premium paid by the DOR will be promptly reimbursed by the Grantee or the DOR will withhold amounts sufficient to pay premium from the Grantee’s payments. In the alternative, the DOR may cancel this Grant.

* + 1. Acceptable Insurers

All insurance companies must carry a rating acceptable to the Office of Risk and Insurance Management. If the Contractor is self-insured for a portion or all of its insurance, review of financial information including a letter of credit may be required.

* + 1. Endorsement and Waiver of Subrogation

Any required endorsements requested by the State must be physically attached to all requested certificates of insurance and not substituted by referring to such coverage on the certificate of insurance. The workers’ compensation policy must contain a waiver of subrogation in favor of the State. Endorsements and Waiver of subrogation will be required if awarded a grant.

* + 1. Enforcement of Agreement Provisions (non-estoppel)

The Grantee acknowledges and agrees that any actual or alleged failure on the part of the DOR to inform the Grantee of non-compliance with any requirement under this Grant, does not impose any additional obligations on the DOR and does not waive any rights of the DOR hereunder.

* + 1. Requirements Not Limiting

Requirements of specific coverage features or limits contained in this section are not intended as a limitation on coverage, limits, or other requirements, or a waiver of any coverage normally provided by any insurance. Specific reference to a given coverage feature is for purposes of clarification only as it pertains to a given issue and is not intended by any party or insured to be all inclusive, or to the exclusion of other coverage, or a waiver of any type. All insurance coverage and limits provided by the Grantee and available or applicable to this Grant are intended to apply to the full extent of the policies.

Nothing contained in this Grant limits the application of such insurance coverage.

* + 1. Coverage Requirements

Commercial General Liability – Grantee shall maintain general liability on an occurrence form with limits not less than $1,000,000 per occurrence for bodily injury and property damage liability combined with a $2,000,000 annual policy aggregate. The policy shall include coverage for liabilities arising out of premises, operations, subcontractors and/or subconsultants, independent contractors, products, completed operations, personal & advertising injury, and liability assumed under the Grant. This insurance shall apply separately to each insured against whom claim is made or suit is brought subject to the Grantee’s limit of liability.

Workers Compensation and Employers Liability – Grantee shall maintain statutory worker’s compensation and employer’s liability coverage for all its employees who will be engaged in the performance of the grant. Employer’s liability limits of $1,000,000 are required.

Professional Liability (if applicable) – Grantee shall maintain Professional Liability at $1,000,000 per occurrence and $2,000,000 aggregate covering any damages caused by a negligent error, act, or omission. The policy’s retroactive date must be displayed on the certificate of insurance and must be before the date this grant is executed.

Automobile Liability (If Applicable) – For DOR consumers being provided transportation under said Grant, the Grantee shall maintain motor vehicle liability with limits not less than $1,000,000 combined single limit per accident. Such insurance shall cover liability arising out of a motor vehicle including owned, hired and non-owned motor vehicles to include the following additional insurance coverage below:

For public schools and other State or local public agencies: Automobile Liability insurance must include Any-Auto, Hired-Autos, Non-Owned Autos, and any other auto used in performing services under the Grant. For seating capacity up to 7 people (includes driver), the Grantee’s certificate of insurance shall state a limit of liability of not less than $1,000,000 per occurrence for bodily injury and property damage liability combined. For seating capacity for 8 to 15 people (includes driver) the certificate of insurance shall state a limit of liability of not less than $1,500,000 per occurrence for bodily injury and property damage liability combined. For seating capacity for 16 passengers or more the certificate of insurance shall state a limit of liability of not less than $5,000,000 per occurrence for bodily injury and property damage liability combined.

The following must be included as part of the policy and must be noted on the certificate of insurance: The State of California, its officers, agents, and employees as additional insured, but only with respect to work performed under the Agreement.

* + 1. Notice of Cancellation

The Grantee agrees to oblige its insurance agent or broker and insurers to provide to the DOR a minimum of 30 days notice of cancellation (except for nonpayment, for which 10 days notice is required), material change in coverage, or nonrenewal of coverage for each required coverage.

* + 1. Additional Insured Status

The general liability and auto liability policies must provide or be endorsed to provide the DOR and its officers, officials, employees, and agents with additional insured status. This provision must also apply to any excess liability policies.

* + 1. Self-insured Retentions

Any self-insured retentions must be declared to DOR.

* + 1. Timely Notice of Claims

The Grantee must give the DOR prompt and timely notice of claims made or suits instituted that arise out of, or result from, the Grantee’s performance, and that involve, or may involve, coverage under any of the required liability policies.

* + 1. Subcontractors

To the extent that the Grantee engages the services of subcontractors and/or subconsultants, the Grantee agrees to require the same insurance as required of the Grantee, except as to limits. The limits of insurance for subcontractors and subconsultants must be no less than $1 million each occurrence and in coverage on insurance for which a limit is specified above.

* 1. Debarment, Suspension, and Non-procurement

This RFA and subsequent grants are covered transactions for purposes of 2

C.F.R. Part 1200. As such, the Grantees are required to comply with applicable provisions of Executive Orders Nos. 12549 and 12689; and “Debarment and Suspension,” 31 U.S.C. section 6101 note; which adopt and supplement the provisions of U.S. Office of Management and Budget (U.S. OMB) “Guidelines to Agencies on Government-wide Debarment and Suspension (Non-procurement),” 2 C.F.R. Part 180.

The Applicant’s signature on the Cover Sheet and Assurances must also constitute a certification under penalty of perjury under the laws of the State of California that the Applicant or any person associated therewith in the capacity of owner, partner, director, officer or manager:

* Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;
* Have not had one or more public transactions (federal, state, and local) terminated within the preceding three years for cause or default;
* Has not been convicted within the preceding three years of any of the offenses listed in 2 C.F.R. section 180.800(a) or had a civil judgment rendered against it for one of those offenses within that time period; and,
* Are not presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state or local) with commission of any of the offenses listed in 2 C.F.R. section 180.800.

Should the Grantee become excluded or disqualified as defined in this section during the life of the Grant, the Grantee must immediately inform the DOR of this exclusion or disqualification.

* 1. Prohibition on Tax Delinquency

Any agreement that a state agency enters into after July 1, 2012, is void if the grant is between a state agency and a grantee, or subcontractor, whose name appears on either list of the 500 largest tax delinquencies pursuant to Section 7063 or 19195 of the Revenue and Taxation Code. (Public Contract Code section 10295.4). In accordance with Public Contract Code section 10295.4, agencies are required to cancel agreements with entities that appear on either list.

## NARRATIVE AND BUDGET AND STAFFING PLAN

The total number of points available are 100, distributed in the categories below. Details of the benchmarks are in ATTACHMENT 7 – Evaluation and Scoring. The DOR reserves the right not to fund applications that receive an average per reviewer score of 60 points or less.

## NARRATIVE (80 total points possible)

All grant applications must contain a narrative that addresses how the organization will carry forth this RFA per the areas outlined below. The narrative shall be in the following format:

* Typed
* Single sided pages
* Single-spaced
* Arial 14 point font,
* 8 ½” x 11” page with 1” margins,
* Pages must be numbered to show the page numbers and total number of pages in the response; (e.g., Page 1 of 30, Page 2 of 30, etc.). Pages must be numbered at the bottom of the page
* Maximum of thirty (30) pages which includes the sections of: 1. Organization Description,2. Organization Experience, 3. Assessment of Needs, 4. Network Hub Organization Structure, 5. Proposed Work Plan, 6. Project Outcomes and Objectives, 7. Evaluation.

The narrative must contain the elements listed below:

Section 1: Organization Description: **(5 total points possible)**

* Describe the organization’s mission, goals, values, and geographic service area and how these elements support a successful statewide System’s Change network.
* Describe the organization’s commitment to the independent living movement and practice of independent living philosophy.
* Describe the organization’s history of engaging people with disabilities in planning and conducting efforts to influence public policy, program design, and/or program practice and systems change that directly affect them.
* Describe how the organization will meet the required commitment to staff the proposed project with persons with disabilities.

Section 2: Organization Experience: **(5 total points possible)**

* Describe the organization’s experience and accomplishments with community organizing, supporting systemic change, and activities related to maintaining or increasing access to community-based services for people with disabilities in California.
* Describe the organization’s experience with coordinating and supporting statewide community organizing efforts with larger cross-disability community networks to support issues of common interest to persons with disabilities that are related to community-based living.
* Describe the organization’s experience coordinating and collaborating with the statewide network of ILCs. This can include coordination and collaboration on systems change initiatives, outreach and training, or direct services and programs.

Section 3: Assessment of Needs: **(10 total points possible)**

* Describe the organization’s understanding of the current activities of the existing networks in California working towards systemic change for people with disabilities in alignment with the Independent Living movement and philosophy.
* Provide an analysis of the Network’s strengths, weaknesses, opportunities, and threats (SWOT) related to pursuing the Network Hub's purpose identified in this RFA.
* Describe how the organization will use the SWOT analysis, provide information about what is necessary for the future direction of the Network Hub in providing guidance for the Systems Change Network including for at-least one statewide initiative and for local initiatives.

Section 4: Network Hub Organization Structure: **(10 total points possible)**

* Describe the organization’s proposed structure and staffing for the Network Hub and the relationships with System Change Network members that will support carrying out the Network Hub's services and activities as described in section Vl of the RFA.

Section 5: Proposed Work Plan: **(20 total points possible)**

* Describe the work plan for the proposed Network Hub's goals, objectives, activities, strategies, responsible parties, that will effectively support the Systems Change Network members to carry out the Network Hub's services and activities as described in section IV of the RFA. The work plan should include:
  + Identification of at-least one statewide transformative initiative for advocacy and community organizing to ensure integration of people with disabilities into systems reform and modernization efforts.
  + Two (2) virtual public forums in partnership with stakeholder groups to identify disparities and inequities in community living focused on unmet needs in HCBS programs. These forums will also gather any best or promising practices that may have improved access to HCBS.
  + A series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.
  + A white paper on HCBS developed which highlights the disparities in California as well as identifies possible solutions.
  + How local and statewide community organizing initiatives will be supported in coordination with ILCs and other stakeholders including training, technical assistance and other supports.
  + Development of fact sheets, issue briefs or papers, and other materials to educate policy makers and stakeholders on the needs of people with disabilities, barriers to integration, and possible solutions to ensure systems are responsive to the needs of people with disabilities.
* Timeline: Describe the timeframe of the project work and how it will occur in a logical order to accomplish the project work plan and achieving the mission and goals of the 2025-2027 SPIL. This includes the second and third years of the project in the work plan.
* Describe how the organization will use responsible staff, contractors or other entities to provide project tasks and activities statewide.

Section 6: Projected Outcomes and Objectives: **(15 total points possible)**

* Describe the measurable outcomes for the Network Hub and System Change Network activities and projects that meet the Network Hub’s purpose as identified in the RFA and the mission and goals of the SPIL.
* Identify specific measures of success that will be used for each component of the program for reporting. Measurable outcomes include:
  + Best or promising practices that will improve access to HCBS.
  + A series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.
  + A white paper on HCBS developed which highlights the disparities in California as well as identifies possible solutions.
  + Number of unduplicated individuals engaged in each systems change initiative and in total for the year.
  + How many people and organizations provided training and provided technical assistance by issue area.
  + How many people, organizations, and representatives educated in disability issues.
  + How many educational materials developed including fact sheets, articles, letters, issue briefs or papers, etc.
  + How many outreach events and activities.
  + How many meetings with Systems Change Network Hub members including ILCs and number of unduplicated individuals participating annually.
  + What specific systems change will occur that increases access to public and private resources that enhance independence due to Systems Change Network Hub activities.
  + Other specific measures of success related to this RFA.

Section 7: Evaluation Measures: **(15 total points possible)**

* Describe the evaluation criteria and the methods the organization will use to monitor and evaluate the grant program’s progress in meeting the workplan goals and the outcomes and objectives.
* Describe how the organization will respond to emerging program needs to prompt timely programmatic adjustments when necessary.
* Describe how the organization will provide detailed, timely, and accurate fiscal and programmatic reporting.

## BUDGET AND STAFFING PLAN: (20 total points possible)

Provide a proposed Budget using Attachment 9, for the annual amounts listed below, and a Budget Narrative using Attachment 8.

February 1, 2025, to September 30, 2025, funding is $234,000.

October 1, 2025, to September 30, 2026, funding is $350,000.

October 1, 2026, to September 30, 2027, funding is $350,000.

The budget should include planned expenditures, made available through this grant, by year and line item in spreadsheet and in narrative format including, but not limited to, the following categories.

* 1. Personnel
  2. Operating Expenses
  3. Equipment

Budget expenditures should clearly align with the activities described in the narrative and should have a logical purpose in support of the intended outcomes described therein. Page limit does not apply to the budget narrative.

### Section 1: Proposed Budget and Budget Narrative (15 Points)

* + - 1. Attachment 8 Budget narrative - Complete the Budget Narrative using Attachment 8.
      2. Attachment 9 Budget - Complete the Attachment 9 Budget spreadsheet for each of the 3-year timeframes.

### Section 2: Proposed Staffing Plan (5 Points)

1. Describe each of the personnel positions charged to the grant and how it is aligned with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. Include how staffing plan is diverse and inclusive and seeks to maintain a multilingual staff.
2. Provide resumes for key personnel (Executive Director and/or Program Manager/s) that demonstrate leadership experience and qualifications for supporting the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures.
3. Provide duty statements for all positions funded under this proposal that demonstrate qualifications needed to support the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures.

Grantees and Subcontractor’s administrative activities cannot exceed 15% of the funded amount in the grant. These must be documented actual costs and are subject to approval by DOR.

### ATTACHMENT 1: Required Document Checklist

A complete application package must consist of the items identified below. Complete this checklist to confirm the items are included in your application. Place a check mark or “X” next to each item that is being submitted to DOR. For your application to be responsive, **all required documents listed below must be returned with bid**. This checklist must also be returned with your bid package.

|  |  |
| --- | --- |
|  | Table of Contents (with all sections of the application with corresponding page numbers) |
|  | Required Attachment Check List (Attachment 1) |
|  | Cover Sheet and Assurances (Attachment 2) Page 1 signed by an authorized representative |
|  | Articles of Incorporation |
|  | Organization’s Bylaws |
|  | Organization’s Annual Corporate Report, as filed with the CA Secretary of State (see Attachment 3 for sample report) |
|  | Entity status letter from the CA Franchise Tax Board (see Attachment 4 for sample letter) |
|  | Nonprofit status letter from the Internal Revenue Service (see Attachment 5 for sample letter) |
|  | Two (2) Letters of Support from ILCs as part of application |
|  | Proof of Insurance coverage for General Liability, Worker’s Compensation and, if applicable, Professional Liability (see Attachment 6 for sample certificate) |
|  | Application Narrative Sections 1 through 7 (maximum of 30 pages)  Section 1. Organization Description  Section 2. Organization Experience  Section 3. Assessment of Needs  Section 4. Network Hub Organization Structure  Section 5. Proposed Work Plan  Section 6. Project Outcomes and Objectives  Section 7. Evaluation |
|  | Budget and Staffing Plan:   * Proposed Budget and Budget Narrative   + Budget Narrative (Attachment 8)   + Budget Spreadsheet (Attachment 9) * Proposed Staffing Plan   + Description of personnel positions   + Key personnel resumes   + Duty statements for all positions funded |

# ATTACHMENT 2: Cover Sheet and Assurances

**Page 1**

Applicant (Organization): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Physical Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_\_\_\_\_\_ Zip Code: \_\_\_\_\_\_\_\_\_

Tax ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Director: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Grant Administrator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person for Application: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The applicant certifies that, to the best of their knowledge and belief, the data and information in this application is true and correct.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Page 1 of this Attachment must be completed and signed by the applicant, and one copy of the below-listed required documentation **must be returned with the application as outlined in SECTION 7. Submittal of Applications**

**ATTACHMENT 2: Cover Sheet and Assurances**

**Page 2**

1. Corporate:
   1. Copy of organization’s articles of incorporation.
   2. Copy of organization’s bylaws.
   3. Copy of organization’s annual corporate report, as filed with the California Secretary of State for all organizations who have completed one (1) year of fiscal operation.
2. Financial Status:
   1. Provide Entity Status letter from the California Franchise Tax Board indicating nonprofit status.
   2. Provide Nonprofit status letter from the Internal Revenue Service.
3. Licensing and Certification (if applicable):
   1. If your organization operates a licensed health facility or facilities, attach a current copy of the certificate(s).
   2. Statement that licensing requirements have been met or are in process.
   3. The organization agrees to hire, employ, and sub-contract with only licensed and/or certified personnel for the provision of all services that require such licensure and/or certification.
4. Compliance with Federal and State Regulations:

By signing the Cover Sheet and Assurances, the applicant agrees to comply with all federal and State legal requirements, including Department of Rehabilitation policies and regulations, which apply to the services being provided.

1. Proof of Insurance:

As part of your grant agreement with the Department of Rehabilitation, you are required to carry insurance coverage. An application can be rejected if, after review of the documents submitted under this section, verification of insurance is missing.

**ATTACHMENT 2: Cover Sheet and Assurances**

**Page 3**

You must submit applicable:

* 1. Commercial General Liability Insurance
  2. Workers’ Compensation Insurance
  3. Professional liability insurance, if applicable

Debarment, Suspension, and Non-procurement

1. Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency.

B. Has not had one or more public transactions (federal, state, and local) terminated within the preceding three years for cause or default.

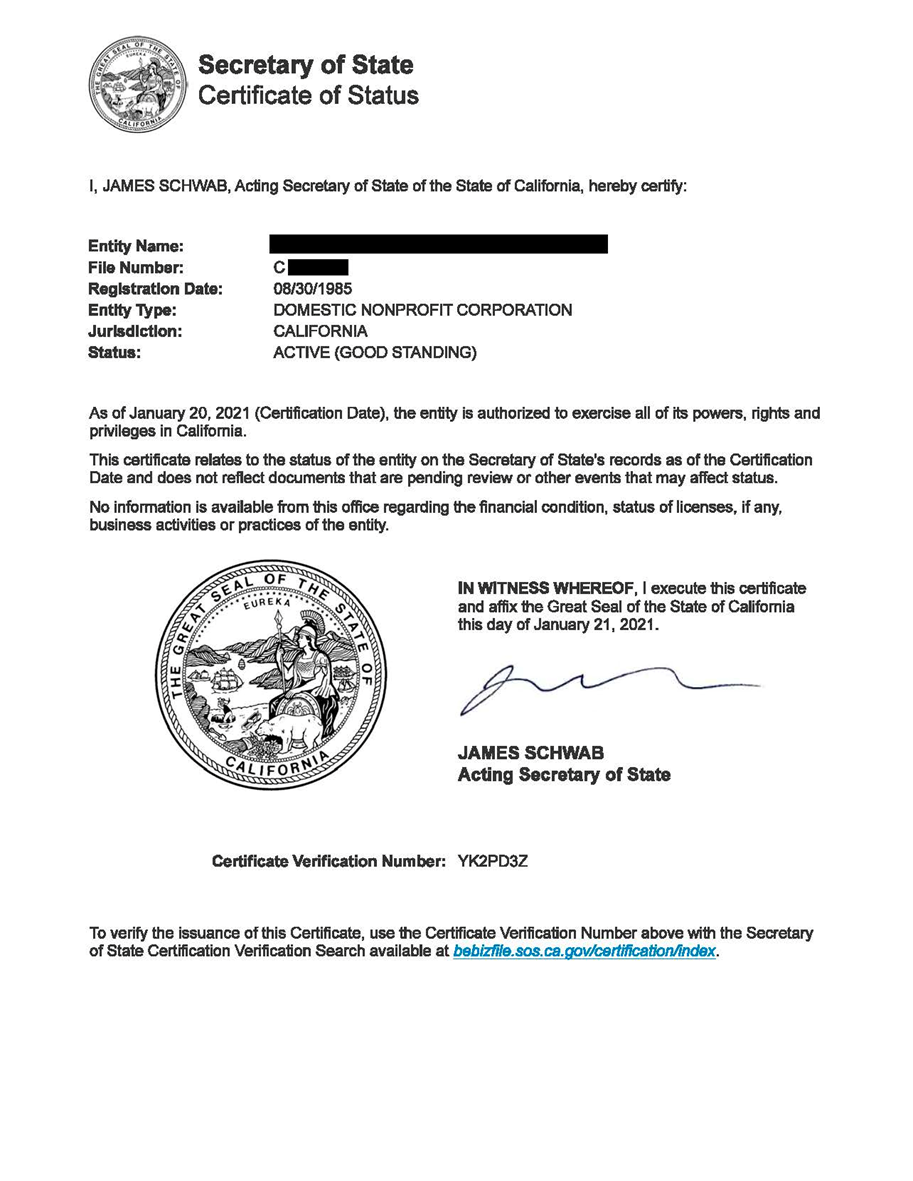
C. Has not been convicted withing the preceding three year of any of the offenses listed in Title 2 C.F.R. section 180.800(a) or had a civil judgement rendered against it for one of those offenses within that time period; and,

D. Is not presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses listed in Title 2 C.F.R. section 180.800.

Should the Grantee become excluded or disqualified as defined in this section during the life of the Grant, the Grantee must immediately inform the DOR of this exclusion or disqualification.

# ATTACHMENT 3:

# Sample of Secretary of State Organization’s Annual Corporate Report



### ATTACHMENT 4: Sample Entity Status Letter from CA Franchise Tax Board

### Sample of Entity Status Letter from the California Franchise Tax Board

### ATTACHMENT 5: Sample Non-Profit Status Letter from the IRS

### Sample of Non-Profit Status Letter from the IRS

### ATTACHMENT 6: Sample of Proof of Insurance Coverage

### Sample of the Proof of Insurance Coverage Certificate

### Attachment 7: Evaluation and Scoring

The following benchmark materials will be provided to the evaluators. Applications can receive up to 100 points possible. Each section and its elements are outlined in the table below. Scoring criteria can be found on the following page.

|  |  |  |  |
| --- | --- | --- | --- |
| # | Response | Element Possible Score | Actual Score |
| **A.** | **Narrative** |  |  |
| 1 | Section 1: Organization Description | 5 |  |
| 2 | Section 2: Organization Experience | 5 |  |
| 3 | Section 3: Assessment of Needs | 10 |  |
| 4 | Section 4: Network Hub Organization Structure | 10 |  |
| 5 | Section 5: Proposed Work Plan | 20 |  |
| 6 | Section 6: Projected Outcomes and Objectives | 15 |  |
| 7 | Section 7: Evaluation Measures | 15 |  |
| **B.** | **Budget and Staffing Plan** |  |  |
| 1 | Section 1: Budget and Budget Narrative | 15 |  |
| 2 | Section 2: Staffing Plan | 5 |  |
| **Total Possible Score** | | **100** |  |

1. **Narrative Section 1: Organization Description - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (4 to 5 points)** | **Qualified (2 to 3 points)** | **Not Qualified (0 to 1 points)** |
| * The organization’s mission, goals, values, and geographic service area [clearly] and [logically] align with the work of a statewide network in support of advocacy and systemic change for people with disabilities. * The response describes the [specific] and [tangible] activities and practices that speak to a [longstanding] and [organization wide] commitment to and understanding of the Independent Living movement and philosophy. * The response demonstrates a history of [frequent], [substantive], and [successful] activities to engage people with disabilities in influencing public programs, policies, and systems that directly affect them. * The response demonstrates in their existing staffing and their recruitment strategies that people with disabilities [will represent 51% or more] of the project staffing in [key] and [leadership positions]. | * The organization’s mission, goals, values, and geographic service area are [generally] in alignment with the work of a statewide network in support of advocacy and systemic change for people with disabilities. * The response is indicative that there is a [general] understanding of the independent living movement and philosophy throughout the organization as evidenced by practices and efforts that occur with [regularity] in support of the independent living movement and philosophy. * The response describes [established] and [meaningful] activities that occur with [regularity] to engage people with disabilities in influencing public programs, policies, and systems that directly affect them. * The response demonstrates in their existing staffing and their description of [specific] recruitment strategies an [intentional] effort to support inclusion of people with disabilities in the organization, including [key] and [leadership positions] on the project. | * The organization’s mission, goals, values, and geographic service area show [little or no] alignment with the activities of a successful statewide network designed to support advocacy and systemic change for people with disabilities. * The response is indicative of [minimal] familiarity or a [fundamental misunderstanding] of the Independent Living movement and philosophy. * The response [does not] demonstrate that engagement with people with disabilities in influencing public programs, policies, and systems occurs with any [meaningful regularity] or [depth]. * The response [does not] describe either existing staffing or organizational recruitment strategies that center people with disabilities in the project |

**Organization Description - Score \_\_\_\_/5 points**

**Comments:**

1. **Narrative Section 2: Organization Experience - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (4 to 5 points)** | **Qualified (2 to 3 points)** | **Not Qualified (0 to 1 points)** |
| * The response describes [specific], [frequent], and [longstanding leadership] by the organization in community organizing and efforts related to systemic change resulting in [tangible successes] related to maintaining or increasing access to community-based services for people with disabilities. * The response describes [specific] and [longstanding leadership] by the organization in coordinating and supporting community organizing efforts with local [and] statewide networks to support issues of common interest to persons with disabilities related to community-based living. * The response describes [specific] and [longstanding leadership] by the organization in coordinating and collaborating with the statewide network of ILCs on systems change initiatives, outreach and training, or direct provision of services and supports for community-based living. | * The response describes [frequent] and [substantive] participation by the organization in community organizing and efforts related to systemic change resulting in [tangible successes] for maintaining or increasing access to community-based services for people with disabilities. * The response describes [regular participation] and [partnerships] by the organization in coordinating and supporting community organizing efforts with statewide [or] community networks, with [more weight given to statewide partnerships], to support issues of common interest to persons with disabilities related to community-based living. * The response describes [regular participation] and [partnerships] by the organization in coordinating and collaborating with the statewide network of ILCs on systems change initiatives, outreach and training, or direct provision of services and supports for community-based living. | * The response [lacks] or provides only [vague] descriptions of the efforts and outcomes of community organizing and systems change undertaken by the organization related to maintaining or increasing access to community-based services for people with disabilities. * The response [does not] describe [significant] or [ongoing] efforts coordinating and supporting community organizing to support issues of common interest to persons with disabilities that are related to community-based living. * The response [does not] describe [significant] or [ongoing] efforts by the organization in coordinating and collaborating with the statewide network of ILCs on systems change initiatives, outreach and training, or direct provision of services and supports for community-based living.   . |

**Organization Description - Score \_\_\_\_/5 points**

**Comments:**

1. **Narrative Section 3: Assessment of Needs - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (8 to 10 points)** | **Qualified (6 to 7 points)** | **Not Qualified (0 to 5 points)** |
| * The response articulates an [in-depth], [specific], and [comprehensive] understanding of the existing networks in California working towards systemic change for people with disabilities in alignment with the Independent Living movement and philosophy. * [All four] elements of the SWOT analysis are [specific], [logical], and [relevant] to the current Systems Change Network and the Network Hub's purpose as identified in this RFA. * The response provides a [specific] and [outcome-oriented] description of how the SWOT analysis will be used to support the Network Hub in providing guidance for the Systems Change Network with [clear] and [logical] alignment to the services and activities described in this RFA (refer to section IV of the RFA for a detailed listing of services and activities) including for the identification of at-least one statewide initiative and for local initiatives. | * The response articulates a [general] understanding of the existing networks in California working towards systemic change for people with disabilities in alignment with the Independent Living movement and philosophy. * The SWOT analysis elements are [logical] and [relevant] to the current Systems Change Network and the Network Hub's purpose although some elements of the analysis may [lack the specificity] of a well-qualified response. * The response provides a [general] description of how the SWOT analysis will be used to support the Network Hub in providing guidance for the Systems Change Network with [broad] alignment to the services and activities described in this RFA including for the identification of at-least one statewide initiative and for local initiatives. | * The response is indicative of [minimal] familiarity or a [fundamental misunderstanding] of the activities of the existing networks in California working towards systemic change for people with disabilities in alignment with the Independent Living movement and philosophy. * The SWOT analysis elements are [vague] or [not relevant] to either the current Systems Change Network and the Network Hub's purpose as identified in this RFA. * The description of how the SWOT analysis will be used to guide the Network Hub in providing guidance for the Systems Change Network is [vague] or [absent] or has [little or no] alignment to the services and activities described in this RFA including for the identification of at-least one statewide initiative and for local initiatives. |

**Organization Description - Score \_\_\_\_/10 points**

**Comments:**

1. **Narrative Section 4: Network Hub Structure - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (8 to 10 points)** | **Qualified (6 to 7 points)** | **Not Qualified (0 to 5 points)** |
| * The response provides a [specific] and [logical] description of the organization’s proposed structure and staffing for the Network Hub, including how this structure interacts with the System Change Network, and also makes [direct] links between the proposed structure and the ability to successfully carry out the Network Hub's services and obligations (refer to section 6 of the RFA on page 11 for a detailed listing of services and obligations). | * The response provides a [logical] description of the organization’s proposed structure and staffing for the Network Hub, including how this structure interacts with System Change Network, but may [lack specificity] between the proposed structure and the ability to successfully carry out the Network Hub's services and obligations (refer to section 6 of the RFA for a detailed listing of services and obligations). | * The response [lacks] or provides only [vague] description of the organization’s proposed structure and staffing for the Network Hub, including how this structure interacts with System Change Network, with [no apparent] link between the proposed structure and the ability to successfully carry out the Network Hub's services and obligations (refer to section 6 of the RFA for a detailed listing of services and obligations). |

**Network Hub Structure- Score \_\_\_\_/10 points**

**Comments :**

1. **Narrative Section 5: Proposed Work Plan - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (16 to 20 points)** | **Qualified (11 to 15 points)** | **Not Qualified (0 to 10 points)** |
| * The work plan is [specific] and [logical] for [all] work plan elements (goals, objectives, activities, strategies, responsible parties), and articulates a [clear] and [relevant] link between all elements described in the work plan and the ability to support the Systems Change Network members to successfully carry out the Network Hub's services and activities (refer to section VI of the RFA for a detailed listing of services and activities on page 11). The work plan includes:   + At least one [specific] and [logical] statewide transformative initiative for advocacy and community organizing to ensure integration of people with disabilities into systems reform and modernization efforts.   + How the organization will [specifically] plan and conduct two (2) virtual public forums in partnership with stakeholder groups to identify disparities and inequalities in community living focused on unmet needs in HCBS programs.   + How the organizations will [specifically] create a series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.   + How the organization will [specifically] develop a white paper on HCBS which highlights the disparities in California as well as identifies possible solutions.   + How local and statewide community organizing initiatives will [specifically] be supported in coordination with ILCs and other stakeholders to include training, technical assistance and other supports.   + How the organizations will [specifically] develop fact sheets, issue briefs and papers, and other materials to educate policy makers and stakeholders on the needs of people with disabilities, barriers to integration, and possible solutions to ensure systems are responsive to the needs of people with disabilities. * The proposed project plan timeframe is, for [all] 32 months of the grant period, [relevant], [achievable], yet [ambitious], using [specific dates] over general timeframes, and articulates a [logical] order to accomplish the RFA project work plan and the mission and goals of the 2025-2027 SPIL. * The response provides a [detailed] and [outcome-oriented] description of [how] the organization will use [highly] qualified staff, contractors or other entities to provide project tasks and activities statewide. | * The work plan is [logical] and addresses [all] work plan elements (goals, objectives, activities, strategies, responsible parties), and articulates a [relevant] link between all elements described in the work plan and the ability to support the Systems Change Network members to successfully carry out the Network Hub's services and activities, though it may [lack the clarity and specificity] of a well-qualified response. The work plan includes:   + At least one [logical] statewide transformative initiative for advocacy and community organizing to ensure integration of people with disabilities into systems reform and modernization efforts.   + How the organization will [logically] plan and conduct two (2) virtual public forums in partnership with stakeholder groups to identify disparities and inequalities in community living focused on unmet needs in HCBS programs.   + How the organizations will [generally] create a series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS, develop a white paper on HCBS which highlights the disparities in California as well as identifying possible solutions and organize   + How the organization will [generally] develop a white paper on HCBS which highlights the disparities in California as well as identifies possible solutions.   + How local and statewide community organizing initiatives will [generally] be supported in coordination with ILCs and other stakeholders to include training, technical assistance and other supports.   + How the organizations will [generally] develop fact sheets, issue briefs and papers, and other materials to educate policy makers and stakeholders on the needs of people with disabilities, barriers to integration, and possible solutions to ensure systems are responsive to the needs of people with disabilities. * The proposed project plan timeframe is [relevant] and [achievable] for [all] 32 months of the grant period but may rely more on [general timeframes] over specific dates and articulates a [logical] order to accomplish the RFA project work plan and the mission and goals of the 2025-2027 SPIL. * The response provides a [general] description of [how] the organization will use [reasonably] qualified staff, contractors or other entities to provide project tasks and activities statewide with [broad focus] on project outcomes. | * The work plan is [vague], [does not] address all elements of the work plan (goals, objectives, activities, strategies, responsible parties), and articulates [little or no] connection between the work plan and the ability to successfully achieve the Network Hub's services and activities. The work plan does not include:   + How the organization will plan and conduct two (2) virtual public forums in partnership with stakeholder groups to identify disparities and inequalities in community living focused on unmet needs in HCBS programs.   + How the organizations will create a series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS, develop a white paper on HCBS which highlights the disparities in California as well as identifying possible solutions and organize.   + How the organization will develop a white paper on HCBS which highlights the disparities in California as well as identifies possible solutions.   + How local and statewide community organizing initiatives will be supported in coordination with ILCs and other stakeholders to include training, technical assistance and other supports.   + How the organizations will develop fact sheets, issue briefs and papers, and other materials to educate policy makers and stakeholders on the needs of people with disabilities, barriers to integration, and possible solutions to ensure systems are responsive to the needs of people with disabilities. * The proposed project plan timeframe is [vague], [does not account] for the [entire] 32-month grant period, or [lacks a logical] order to accomplish the RFA project work plan and the mission and goals of the 2025-2027 SPIL. * The response [lacks] or provides only [vague] descriptions of [how] the organization will use staff, contractors or other entities to provide project tasks and activities with [little or no] connection to project outcomes. |

**Proposed Work Plan- Score \_\_\_\_/20 points**

**Comments:**

1. **Narrative Section 6: Proposed Outcomes and Objectives - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (12 to 15 points)** | **Qualified (8 to 11 points)** | **Not Qualified (0 to 10 points)** |
| * The response describes [specific], [relevant], and [achievable] measurable outcomes for the Network Hub and System Change Network activities and projects that meet the Network Hub’s purpose as identified in the RFA and [meaningfully advances] the hub’s work towards achieving the mission and goals of the SPIL. * The response articulates [specific] and [logical] measures that will be used to [clearly] quantify the degree of success achieved for each component of the program. Measurable outcomes include [five or more] of the following:   + Best or promising practices that will improve access to HCBS.   + A series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.   + A white paper on HCBS developed which highlights the disparities in California as well as identifies possible solutions.   + Number of unduplicated individuals engaged in each systems change initiative and in total for the year.   + How many people and organizations provided training and provided technical assistance by issue area.   + How many people, organizations, and representatives educated in disability issues.   + How many educational materials developed including fact sheets, articles, letters, issue briefs or papers, etc.   + How many outreach events and activities.   + How many meetings with Systems Change Network Hub members including ILCs and number of unduplicated individuals participating annually. * What [specific] systems change will occur that increases access to public and private resources that enhance independence due to Systems Change Network Hub activities. * Other [specific] measures of success related to this RFA. | * The response describes [relevant] and [achievable] measurable outcomes for the Network Hub and System Change Network activities and projects that meet the Network Hub’s purpose as identified in the RFA but may [lack specificity] or [fail to describe] how the outcomes [meaningfully advance] the hub’s work towards achieving the mission and goals of the SPIL. * The response articulates [logical] measures that will be used to quantify the degree of success achieved but [lack the specificity] for every component of the program of a well-qualified response. Measurable outcomes include [two or more] of the following:   + Best or promising practices that will improve access to HCBS.   + A series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.   + A white paper on HCBS developed which highlights the disparities in California as well as identifies possible solutions.   + Number of unduplicated individuals engaged in each systems change initiative and in total for the year.   + How many people and organizations provided training and provided technical assistance by issue area.   + How many people, organizations, and representatives educated in disability issues.   + How many educational materials developed including fact sheets, articles, letters, issue briefs or papers, etc.   + How many outreach events and activities.   + How many meetings with Systems Change Network Hub members including ILCs and number of unduplicated individuals participating annually. * What [general] systems change will occur that increases access to public and private resources that enhance independence due to Systems Change Network Hub activities. * Other [general] measures of success related to this RFA. | * The response describes [vague], [irrelevant] and/or [clearly unrealistic] outcomes for the Network Hub and System Change Network activities and projects that meet the Network Hub’s purpose as identified in the RFA and mission and goals of the SPIL. * The response [lacks] or provides only a [vague] description of measures that have [little or no logical connection] to the degree of success achieved for each component of the program. Measurable outcomes [do not include any] of the following:   + Best or promising practices that will improve access to HCBS.   + A series of videos/personal stories of people with disabilities throughout the state who have experienced challenges accessing HCBS.   + A white paper on HCBS developed which highlights the disparities in California as well as identifies possible solutions.   + Number of unduplicated individuals engaged in each systems change initiative and in total for the year.   + How many people and organizations provided training and provided technical assistance by issue area.   + How many people, organizations, and representatives educated in disability issues.   + How many educational materials developed including fact sheets, articles, letters, issue briefs or papers, etc.   + How many outreach events and activities.   + How many meetings with Systems Change Network Hub members including ILCs and number of unduplicated individuals participating annually. * The response does not include what systems change will occur that increases access to public and private resources that enhance independence due to Systems Change Network Hub activities. * The response does not include other measures of success related to this RFA. |

**Projected Outcomes- Score \_\_\_\_/15 points**

**Comments:**

1. **Narrative Section 7: Evaluation Measures - [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (12 to 15 points)** | **Qualified (8 to 11 points)** | **Not Qualified (0 to 10 points)** |
| * The response describes [specific], [logical], and [relevant] evaluation criteria and methods the organization will use to monitor and evaluate the grant program’s progress in meeting the workplan goals and the outcomes and objectives. * The response [clearly] describes [specific] strategies that the organization will use to respond to emerging program needs to prompt [timely] and [relevant] programmatic adjustments when necessary. * The response describes the [specific] process the organization will use to complete fiscal and programmatic reporting and [clearly] describes how that process will ensure the required detail, timeliness, and accuracy of reports. | * The response describes [logical] and [relevant] evaluation criteria and methods the organization will use to monitor and evaluate the grant program’s progress in meeting the workplan goals and the outcomes and objectives but [lacks the specificity] of a well-qualified response. * The response [generally] describes strategies that the organization will use to respond to emerging program needs to prompt [timely] and [relevant] programmatic adjustments when necessary. * The response describes the process the organization will use to complete fiscal and programmatic reporting, and how that process will ensure the required detail, timeliness, and accuracy of reports buy [lacks the clarity and specificity] of a well-qualified response. | * The response describes [vague], [inadequate] and/or [irrelevant] evaluation criteria and methods the organization will use to monitor and evaluate the grant program’s progress in meeting the workplan goals and the outcomes and objectives. * The response [lacks] a description of how the organization will respond to emerging program needs or provides a description that [would not] result in [timely] and [relevant] programmatic adjustments when necessary. * The response [lacks] description of the process the organization will use to complete fiscal and programmatic reporting or provides a description that [would not] result in timely and accurate reporting. |

**Evaluation- Score \_\_\_\_/15 points**

**Comments:**

1. **Budget and Staffing Plan Section 1- [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (12 to 15 points)** | **Qualified (8 to 11 points)** | **Not Qualified (0 to 7 points)** |
| * Budget [clearly] and [logically] aligns with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. * Budget matches the identified annual amounts of:   + February 1, 2025, to September 30, 2025, funding is $234,000.   + October 1, 2025, to September 30, 2026, funding is $350,000.   + October 1, 2026, to September 30, 2027, funding is $350,000. * [Clear], [logical], and [specific] (by line item) budget that includes all proposed personnel charged to the grant, includes position title, full-time salary, benefits, and full-time equivalent charged to the grant and (if applicable) operating expenses needed to support the program. * [Clear], [logical], and [specific] indirect cost rate, how it was determined, and lists administrative and general expenses that are included. If the organization uses a cost allocation plan, includes a [clear] and [logical] description of how general administrative expenses are allocated to the grant. | * Budget [generally] aligns with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. * Budget matches the identified annual amounts of:   + February 1, 2025, to September 30, 2025, funding is $234,000.   + October 1, 2025, to September 30, 2026, funding is $350,000.   + October 1, 2026, to September 30, 2027, funding is $350,000. * [Specific] (by line item) budget that includes all proposed personnel charged to the grant, includes position title, full-time salary, benefits, and full-time equivalent charged to the grant and (if applicable) operating expenses needed to support the program. * [General] (or a range) indirect cost rate, how it was determined, and lists administrative and general expenses that are included. If the organization uses a cost allocation plan, includes a [general] description of how general administrative expenses are allocated to the grant. | * Lacks sufficient alignment with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. * Budget does not match the identified annual amounts of:   + February 1, 2025, to September 30, 2025, funding is $234,000.   + October 1, 2025, to September 30, 2026, funding is $350,000.   + October 1, 2026, to September 30, 2027, funding is $350,000. * Lacks a specific budget and does not include all proposed personnel charged to the grant, position title, full-time salary, benefits, and full-time equivalent charged to the grant and (if applicable) operating expenses needed to support the program. * Lacks an indirect cost rate or does not describe the general administrative expenses that are allocated to the grant. |

**Budget- Score \_\_\_\_/15 points**

**Comments:**

1. **Budget and Staffing Plan Section 2- [Text within brackets for added emphasis.]**

|  |  |  |
| --- | --- | --- |
| **Well Qualified (5 points)** | **Qualified (3 to 4 points)** | **Not Qualified (0 to 2 points)** |
| * [Clear], [logical], and [specific] summary of how each of the personnel positions charged to the grant is aligned with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. Includes specific details on how the staffing plan is diverse and inclusive and seeks to maintain a multilingual staff. * Resumes are included for key personnel (Executive Director and/or Program Manager/s) that demonstrate at least [three] years of leadership experience and qualifications for supporting the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. * Duty statements are included for all positions funded under this proposal that [clearly] demonstrate qualifications needed to support the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. | * [General] summary of how each of the personnel positions charged to the grant is aligned with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. Includes [general] details on how the staffing plan is diverse and inclusive and seeks to maintain a multilingual staff. * Resumes are included for key personnel (Executive Director and/or Program Manager/s) that demonstrate at least [one but less than 3] years of leadership experience and qualifications for supporting the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. * Duty statements are included for all positions funded under this proposal but only [generally] demonstrate qualifications needed to support the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. | * Lacks a summary of how each of the personnel positions charged to the grant is aligned with the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. Includes [general] details on how the staffing plan is diverse and inclusive and seeks to maintain a multilingual staff. * Lacks resumes for key personnel (Executive Director and/or Program Manager/s) that demonstrate [one] year of leadership experience and qualifications for supporting the program narrative including the Network Hub Structure, Proposed Work Plan, Projected Outcomes and Objectives, and Evaluation Measures. * Duty statements are not included for all positions funded under this proposal. |

**Budget- Score \_\_\_\_/5 points**

**Comments:**

# ATTACHMENT 8: Sample of Budget Narrative

**(PROGRAM NAME)**

**SYSTEMS CHANGE BUDGET NARRATIVE**

BENEFITS

BENEFIT PERCENTAGE REQUIREMENTS

*For the*

*[SERVICE BUDGET/CERTIFIED EXPENDITURE] NARRATIVE*

*[In the narrative, list the benefit cost rate or range and itemize all benefits being claimed in calculating the percentage rate. The Contractor must include a breakdown of the percent of each benefit being claimed. Include only actual percentages, Do not include estimates. (See sample below.)]*

*Sample language for Benefit Costs:*

*BENEFITS:  Benefits are calculated at a range of 21% – 53%. Blueberry College provides PERS (10%) or STRS (10%) depending on the classification, Social security (6.2%), MediCare (1.45%), health insurance portion (6%), unemployment (6%), retirement (5%) and worker’s compensation (3%).*

*[NOTE: Items already included in the Indirect Cost cannot be used to calculate benefit costs.]*

**Benefits Narrative:**

PERSONNEL

Include all proposed personnel charged to the grant to support program goals, objectives, strategies, and activities. Include personnel positions by title, full-time salary, benefits, and full-time equivalent (FTE) charged to the grant as stated in the budget spreadsheet (Attachment 10.

**[Position Title 1]:**

**[Position Title 2]:**

*[Add or remove additional positions as necessary]*

OPERATING EXPENSES

Include operating expenses needed to support program goals, objectives, strategies, and activities. Operating expenses may include rent, communications, utilities, office supplies, travel, equipment, and other operational expenses. It might also include direct expenses for program activities such as transportation for consumers, education and outreach, and any subcontracted services. *Do not include expenditures being reimbursed through indirect costs (see below).*

*For each operating expense include the following in the space below:*

1. *A list of what specific costs are included in the category. For example, do the communication costs include internet access, telephone access, etc.?*
2. *How the costs will be allocated to the Agreement.  For example, charging a staff person’s communication costs to the Agreement based upon the actual amount of time spent working on the Agreement during the prior month.*

**[Operating Expense 1]:**

**[Operating Expense 2]:**

*[Add or remove additional positions as necessary]*

INDIRECT COST

Include the organization indirect cost rate, how it was determined, and list administrative and general expenses are included (insurance, audits, administrative staff, office supplies, etc.). If the organization uses a cost allocation plan instead of an indirect cost rate, include a clear description of how general administrative expenses are allocated to the grant.

**[Indirect Cost Rate and how determined]:**

**[List of general expenses included in Indirect Cost Rate]:**

# ATTACHMENT 9: RFA Service Budget Spreadsheet

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Grantee Name and Address** | | **Budget Period** | | | **Budget Period** | | | **Budget Period** | | |
|  | | February 1, 2025 – September 30, 2025  $234,000.00 | | | October 1, 2025 – September 30, 2026  $350,000.00 | | | October 1, 2026 – September 30, 2027  $350,000.00 | | |
| **Line No.** | **PERSONNEL-Position Title & Time Base** | **Annual Salary Per FTE** | **Annual FTE** | **Amount Budgeted** | **Annual Salary Per FTE** | **Annual FTE** | **Amount Budgeted** | **Annual Salary Per FTE** | **Annual FTE** | **Amount Budgeted** |
|  | **Administrative Personnel** |  |  |  |  |  |  |  |  |  |
| **1** |  |  |  |  |  |  |  |  |  |  |
| **2** |  |  |  |  |  |  |  |  |  |  |
| **3** |  |  |  |  |  |  |  |  |  |  |
| **4** |  |  |  |  |  |  |  |  |  |  |
| **5** |  |  |  |  |  |  |  |  |  |  |
| **6** | **Admin Subtotal** |  | |  |  | |  |  | |  |
| **7** | **Direct Service Personnel** |  |  |  |  |  |  |  |  |  |
| **8** |  |  |  |  |  |  |  |  |  |  |
| **9** |  |  |  |  |  |  |  |  |  |  |
| **10** |  |  |  |  |  |  |  |  |  |  |
| **11** |  |  |  |  |  |  |  |  |  |  |
| **12** | **Personnel Subtotal** |  | |  |  | |  |  | |  |
| **13** | **OPERATING EXPENSES** |  | | | | | | | | |
| **14** |  |  | |  |  | |  |  | |  |
| **15** |  |  |  |  |
| **16** |  |  |  |  |
| **17** |  |  |  |  |
| **18** |  |  |  |  |
| **19** |  |  |  |  |
| **20** |  |  |  |  |
| **21** |  |  |  |  |
| **22** | **Operating Subtotal** |  | |  |  | |  |  | |  |
| **23** | **Personnel and Operating Subtotal** |  |  |  |
| **24** | **Indirect Rate Percentage** |  |  |  |
| **25** | **Indirect Cost** |  |  |  |
| **27** | **TOTAL (rounded to nearest dollar)** |  |  |  |