



**SUPPORTIVE AND/OR HOUSING SERVICES MASTER AGREEMENT
WORK ORDER SOLICITATION SHSMA-WOS_CBS-010
FOR
TRAINING MANAGEMENT SERVICES**

**LOS ANGELES COUNTY DEPARTMENT OF HEALTH SERVICES
OCTOBER 2020**

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EXHIBITS

Exhibit 1 – Training Classifications Catalog

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WORK ORDER SOLICITATION TRAINING MANAGEMENT SERVICES

1.0 INTRODUCTION

The Los Angeles County (County) Department of Health Services (DHS) is seeking to enter into various Work Orders with one or more qualified Respondent(s) who have the capacity to provide Training Management Services (TMS) for adult specific and/or youth specific trainings designed to support the skills and knowledge of County staff and County partners, fostering an environment of knowledge sharing.

The selected Respondent(s) will provide TMS to support the County's various programs for adults and youth including but not limited to: Housing for Health (HFH) which focuses on creating interim and permanent supportive housing opportunities for the homeless or at risk of being homeless population; the Division of Youth Diversion & Development (YDD) which is responsible for implementing and evaluating a growing network of community-based organizations that provide and coordinate care and services to young people under the age of 18 who participate in YDD sponsored programs in lieu of arrest and entry into the criminal justice system; and the County and Women's Health program, which provides no-to-low cost services/programs to ensure essential care to women of all ages. TMS shall include the provision of administrative support, communicating and coordinating with the County programs to identify training needs and assisting in managing, developing, facilitating and implementing instructor led on-site and web-based trainings. County trainings can be as small as 5 attendees or as large as 500 attendees.

2.0 SCOPE OF SERVICES

2.1 Specific Requirements

The Respondent shall coordinate with the County to develop, facilitate, and manage training needs, including but not be limited to:

- 2.1.1 Develop a training plan inclusive of schedules, registration and attendance rosters for the variety of online, external (various locations throughout the County) and/or internal (at the Respondent's location) trainings in collaboration with the County.
- 2.1.2 Coordinate training needs with the County and other agencies identified by the County.
- 2.1.3 Develop, prepare, and obtain training curricula, educational aids, materials (e.g., job aides, resource guides, program specific "program guides", etc.), and any other supporting materials or

literature that assist trainees in the full understanding of the training(s), as requested by the County. Any training materials distributed to the trainees (e.g., curricula, handouts, etc.) shall be approved by the County no less than 30 days prior to conducting any training, unless otherwise directed by the County.

- 2.1.4 Work with the County to update on an ongoing basis, the trainings in Exhibit 1 – Training Classification Catalog.
- 2.1.5 Procurement of all requested trainings, including current trainings identified in Exhibit 1 – Training Classifications Catalog.
- 2.1.6 Secure all web-based (e.g., Zoom, GoToMeeting, etc.) and in-person training platforms and/or venues.
- 2.1.7 Secure and schedule internal and external trainers who are subject matter experts and are well versed on the applicable trainings identified in Exhibit 1 – Training Classification Catalog.
- 2.1.8 Provide support staff for all trainings.
- 2.1.9 Assist attendees in registering for trainings in a timely manner.
- 2.1.10 Confirm and process all registrations by email that include, but are not limited to, class information, directions and training details.
- 2.1.11 Organize training sessions for groups as small as 5 and up to a maximum of 500 trainees. The number of trainees for each session will be determined by the County.
- 2.1.12 Manage and identify suitable venues with ample parking and provide classroom and/or conference room options for onsite trainings.
- 2.1.13 Coordinate the delivery of and/or print production of County approved training materials.
- 2.1.14 Work with the County to identify and provide equipment needed for each training (e.g., projection system and white board with markers) for onsite trainings.
- 2.1.15 Provide internet access, computers, and other technical equipment necessary for onsite trainings.
- 2.1.16 Provide onsite technical and computer support at the training venue(s).

- 2.1.17 Provide web-based technical support for online trainings.
- 2.1.18 Provide sign-in sheets for each training session and/or maintain online attendance rosters which shall be provided to the County upon request.
- 2.1.19 Provide pre/post-test to trainees to assess retention.
- 2.1.20 Offer interactive exercises through an online/web-based platform, or through traditional classroom settings that maximizes the trainees' retention of training concepts and information provided.
- 2.1.21 Create, distribute and manage tracking of certificates for completion of training sessions.
- 2.1.22 Develop County approved evaluation forms and gather feedback from trainers and attendees after each training session.

2.2 Adult Specific Trainings

The Respondent shall provide the following personnel:

- 2.2.1 Project Manager – shall be responsible for budgeting, invoicing, planning, and the overall oversight of training projects in coordination with DHS and other necessary stakeholders. The project manager shall have a minimum of two years' experience within the last three years including, but not limited to: training or educational curriculum development, budget and expenditure tracking, administrative oversight, quality control plans, data analysis, reporting, and building collaborative partnerships.
- 2.2.2 Instructional Design Coordinator shall be responsible for the creation and management of training services, including but not limited to: development of training course curricula and supportive learning materials, creation and oversight of an online training catalogue, identification of and collaboration with subject matter experts in partnership with DHS, and ensuring the specific requirements of this Work Order Solicitation are met. The Instructional Design Coordinator shall have a minimum of two years' experience within the last three years including, but not limited to utilizing adult learning models, conducting learning needs assessments familiarity with learning management systems and/or similar educational technology, training program development, reporting and evaluation.

2.2.3 Administrative Assistant shall be responsible for the oversight of logistical and administrative tasks required to maintain the provision of training management services, including, but not limited to: logistical and communication support of training information via email, phone and/or the learning management system; training venue identification, coordination between venue point of contact as well as set-up and striking of training venue, act as a liaison between training venue stakeholders, DHS, and learners, provide additional administrative support to the project manager and instructional design coordination as necessary. The Administrative Assistant shall have a minimum of two years' experience within the last three years including, but not limited to the provision of administrative oversight in an office setting, administrative support of training or educational programs, relationship management, and small-scale event planning.

2.3 Youth Specific Trainings

The Respondent shall provide the following personnel:

2.3.1 Project Coordinator shall have a minimum of two years' experience within the last three years in project management providing and developing trainings, have full authority to act for the Respondent on all matters relating to the daily operation of the Work Order, effectively communicate both orally and in writing, shall have proficient writing and computer skills and the ability to produce reports on a regular basis as requested by the County, be accessible by telephone and/or email during business hours and act as a central point of contact with the County.

3.0 FUNDING

Funding will be provided to support the Respondent's Administrative oversight of the TMS.

4.0 WORK ORDER TERM

The Work Order is anticipated to start November 2020, through June 30, 2022. The County shall have the sole option to extend the Work Order term for five (5) additional years through June 30, 2027, provided the Master Agreement is extended beyond June 30, 2022.

5.0 MINIMUM REQUIREMENTS

Interested and qualified Respondents that can demonstrate their ability to successfully provide the services outlined Section 2.0 – Scope of Services, are

invited to submit a Response provided they meet all of the Minimum Requirements below:

- 5.1 A) Respondent shall have current status as a Supportive and/or Housing Services Master Agreement (SHSMA) contractor.

OR

- B) Respondents that are not current SHSMA contractors may respond to this WOS if they submit a Statement of Qualifications to DHS' Request for Statement of Qualifications (RFSQ) for Supportive and/or Housing Services and are issued a Master Agreement. Respondents that fall into this category must respond to the RFSQ by November 4, 2020. These Respondents must meet the minimum requirements to be a SHSMA contractor in order for their Response to this WOS to be considered. The RFSQ can be found at: <http://dhs.lacounty.gov/wps/portal/dhs/cq/>.

5.2 Respondent shall have experience in TMS as follows:

- A) Respondent must have provided project management and curriculum development in three (3) or more classifications identified in Exhibit 1 – Training Classifications Catalog, Section I – Adult Specific, within the last three (3) years.

AND/OR

- B) Respondent must have provided project management and curriculum development as identified in Exhibit 1 – Training Classifications Catalog, Section II – Youth Specific within the last three (3) years.

5.3 **(This requirement only applies to Respondents that have had a County contract reviewed by the Department of the Auditor-Controller within the last 10 years).** Respondent does not have unresolved questioned costs identified by the Department of the Auditor-Controller, in an amount over \$100,000, that are confirmed to be disallowed costs by the contracting County department, and remain unpaid for six (6) months or more from the date of disallowance, unless such disallowed costs are the subject of current good faith negotiations to resolve the disallowed costs, in the opinion of the County.

6.0 WORK ORDER SOLICITATION TIMETABLE

- Work Order Solicitation Release:.....October 14, 2020
- Written Questions Due Date/Time:October 19, 2020 11:00 a.m. PDT
- Response Due Date/Time:.....November 4, 2020 4:00 p.m. PDT

7.0 RESPONDENT QUESTIONS

Questions **must be submitted by e-mail** to the contact person identified below and must be received no later than October 19, 2020 at 11:00 a.m. PDT. All questions, without identifying the submitting Agency, will be compiled and, along with the appropriate answers, will be made available via e-mail to all the current SHSMA Contractors.

When submitting questions, be as specific as possible, indicating the area of the WOS that prompted the question. The County reserves the right to group similar questions when providing answers.

Questions should be emailed to the E-mail address identified below:

Cathy Castellon, Contract Analyst
County of L.A. - Dept. of Health Services
Contracts and Grants Division
E-mail: mcastellon2@dhs.lacounty.gov

8.0 RESPONSE INSTRUCTIONS

The Response to this WOS shall include each of the following in the prescribed format and order:

8.1 Cover Memo

Identify the WOS by title and number; agency name and address; and the name, telephone number, and e-mail address of the person authorized to make representations for the Respondent during negotiations.

8.2 Agency Experience

8.2.1 Provide a detailed description that demonstrates how your agency meets the minimum requirements as specified in Section 5.0 – Minimum Requirements. Include a description of your agency’s experience providing TMS as indicated in:

- Section 5.2 A, Respondent must have provided project management and curriculum development in three (3) or more classifications identified in Exhibit 1 – Training Classifications Catalog, Section I – Adult, within the last three (3) years.

AND/OR

- Section 5.2 B, Respondent must have provided project management and curriculum development as identified in

Exhibit 1 – Training Classifications Catalog, Section II – Youth Specific within the last three (3) years.

Ensure your response includes project start and end dates (month and year), organizations, participant audience, and training topics.

- 8.2.2 Provide the resumes and the description of duties for the Project Manager, the Instructional Design Coordinator and the Administrative Assistant that will be overseeing the Work Order as described in Section 2.2 – Adult Specific Trainings.

AND/OR

- 8.2.3 Provide the resume and the description of duties for the Project Coordinator as described in Section 2.3 – Youth Specific Trainings.
- 8.2.4 Indicate if your agency currently has available training rooms and include the location(s), participant capacity, available equipment, etc.

8.3 Approach and Methodology

Provide a detailed description of your approach and methodology to provide the TMS as described in Section 2.0 – Scope of Services. Ensure your responses include a project plan with timelines, a detailed explanation for accomplishing the specific work and deliverables. The response shall include information that will provide DHS with a clear understanding that your agency has the ability to meet or exceed the services requested in this WOS, at a minimum, describe how your agency will provide the following:

- 8.3.1 Develop a training plan inclusive of schedules, registration and attendance rosters for the variety of online, external (various location throughout the County) and/or internal (at the Respondent’s location) trainings in collaboration with the County.
- 8.3.2 Coordinate training needs with the County and other agencies identified by the County.
- 8.3.3 Develop, prepare, and obtain training curriculum, educational aids, materials (e.g., job aides, resource guides, program specific “program guides”, etc.), and any other supporting materials or literature that assist trainees in the full understanding of the training, as requested by the County.
- 8.3.4 Procure all requested trainings and update on an ongoing basis the trainings in Exhibit 1 – Training Classification Catalog.

- 8.3.5 Secure all web-based (e.g., Zoom, GoToMeeting, etc.) and in-person training platforms and/or venues, including recording of trainings session as requested by the County.
- 8.3.6 Secure and schedule internal and external trainers who are subject matter experts and are well versed on the applicable trainings identified in Exhibit 1 – Training Classification Catalog.
- 8.3.7 Provide support staff, for all trainings.
- 8.3.8 Organize training sessions for groups as small as 5 and up to a maximum of 500 trainees.
- 8.3.9 Manage and identify suitable venues with ample parking and provide classroom and/or conference room options for onsite trainings.
- 8.3.10 Coordinate the delivery of and/or print production of County approved training materials.
- 8.3.11 Identify and provide equipment needed for each training (e.g., projection system and white board with markers) for onsite trainings.
- 8.3.12 Provide internet access, computers, and other technical equipment necessary for onsite trainings.
- 8.3.13 Provide onsite technical and computer support at the training venue(s).
- 8.3.14 Provide web-based technical support for online trainings.
- 8.3.15 Provide sign-in sheets for each training session and/or maintain online attendance rosters and sign-in sheets for each training session.
- 8.3.16 Provide pre/post-test to trainees to assess retention.
- 8.3.17 Offer interactive exercises through an online/web-based platform, or through traditional classroom settings that maximizes the trainees' retention of training concepts and information provided.
- 8.3.18 Create and distribute certificates for completion of training sessions.

8.3.19 Develop evaluation forms and gather feedback from trainers and attendees after each training session.

8.3.20 Maintain a training library that includes an online library with links/videos of trainings.

8.4 Respondent's Budget

Respondent shall complete Exhibit 2 – Budget Form to support administrative oversight funding for one year, line item budget shall include but not limited estimated cost for training sessions, materials, locations, etc.

8.5 Respondent's References

Respondent shall provide three (3) references for services that were provided in your response to Section 8.2 – Agency Experience by completing Exhibit 3 – References.

8.6 Financial Capability

The Respondent shall submit their most current and prior two (2) years (for example 2019, 2018 and 2017) financial statements. Statements should include the company's assets, liabilities, and net worth. At a minimum, include the Balance Sheet (Statement of Financial Positions), Income Statement (Statement of Operations), and the Retained Earnings Statement. If audited statements are available, these should be submitted to meet this requirement. Do not submit Income Tax Returns to meet this requirement. Financial statements will be kept confidential if so, stamped on each page.

9.0 RESPONSE SUBMISSION REQUIREMENTS

The Respondent shall **email** one (1) Response in **PDF format** by the Response Due Date and Time to the E-mail address identified below:

Cathy Castellon, Contract Analyst
County of L.A. - Dept. of Health Services
Contracts and Grants Division
E-mail: mcastellon2@dhs.lacounty.gov

All Respondents shall provide the name of their Agency and the title and number of the WOS on the subject line.

It is the sole responsibility of the submitting Respondent to ensure that its Response is received by the "Response Due Date/Time." Any Responses received after the "Response Due Date/Time," as listed in the WOS Timetable, may be eliminated from considered by DHS, at its sole discretion.

10.0 TRUTH AND ACCURACY OF REPRESENTATIONS

False, misleading, incomplete, or deceptively unresponsive statements in connection with a Response shall be sufficient cause for rejection of the Response. The review and determination in this area shall be at the DHS Director of Contracts and Grant's sole judgment and his judgment shall be final.

11.0 REVIEW AND SELECTION PROCESS

The County reserves the sole right to exercise its judgment concerning the selection and review of the contents of the Responses submitted pursuant to this WOS and to determine which Respondent best serves the interests of the County.

As a result of this WOS, the County may:

1. Request further information, documents, presentations, and/or conference call or in-person interviews substantiating Respondents' qualifications, experience, and readiness to provide the services described in the WOS;
2. Award a Work Order to Respondent(s); and/or
3. Take no further action at this time on this matter.

11.1 Response Selection Process

The selection process will begin with receipt of the Response. Review of the Responses will be conducted in two phases. Respondents who pass Phase One will have their Response reviewed in Phase Two.

11.1.1 Phase One – (Acceptable/Unacceptable)

Phase One will be conducted by the DHS Contracts and Grants Division.

A. Adherence to Minimum Requirements

During Phase One, an acceptable or unacceptable review will be made of the Respondent's Response to Section 8.2 – Agency Experience, Subsection 8.2.1 to determine compliance with the Respondent's Minimum Requirements. Failure by the Respondent to comply and demonstrate that it meets the Minimum Requirements may, in the County's sole discretion, result in its Response being disqualified without further review and consideration. The acceptable/unacceptable criteria are:

- Response was received by the Response Due Date and Time.
- The Respondent meets the Minimum Requirements as set forth in the WOS, Section 5.0 – Minimum Requirements.

B. Verification Process

A review will be conducted of the Respondent's business status by checking with all applicable databases and the references submitted in Exhibit 3 – References, as acceptable or unacceptable. The review may also include, but not be limited to, databases available with the California Secretary of State – Business Programs, California State's Suspended and Ineligible Provider List for Medi-Cal, Federal Debarment List, Federal System for Award Management, and if applicable, a review of the Auditor Controller's Intranet website, and the Contractor Alert Reporting Database reflecting past performance history on County contracts.

C. Financial Capability

A review will be conducted on the Respondent's financial records as indicated in Section 8.6 – Financial Capability as acceptable or unacceptable to determine the Respondent's financial strength. The Respondent will need to demonstrate a history of business stability and financial ability to perform the services in Section 2.0 – Scope of Services.

11.1.2 Phase Two – Review of Written Material (100%)

A. Respondent's Background and Experience

The Respondent will be reviewed on the appropriateness and suitability of its Response to Section 8.2 – Agency Experience to determine if the Respondent has the qualifications, experience, and capacity to provide the services outlined herein.

B. Respondent's Approach and Methodology

The Respondent's narrative response to Section 8.3 – Approach and Methodology.

C. Respondent's Budget

A review will be conducted on the appropriateness and suitability of the Respondent's response to Section 8.4 – Respondent's Budget.

12.0 DISQUALIFICATION REVIEW

A Response may be disqualified from consideration because the County determined it was non-responsive at any time during the review process. If the County determines that a submission is disqualified due to non-responsiveness, the County shall notify the Respondent in writing.

Upon receipt of the written determination of non-responsiveness, the Respondent may submit a written request for a Disqualification Review within the timeframe specified in the written determination.

A request for a Disqualification Review may, in the County's sole discretion, be denied if the request does not satisfy all the following criteria:

1. The person or entity requesting a Disqualification Review is a Respondent;
2. The request for a Disqualification Review is submitted timely (i.e., by the date and time specified in the written determination); and
3. The request for a Disqualification Review asserts that the County's determination of disqualification due to non-responsiveness was erroneous (e.g. factual errors, etc.) and provides factual support on each ground asserted as well as copies of all documents and other material that support the assertions.

The Disqualification Review shall be completed, and the determination shall be provided to the requesting Respondent, in writing, prior to the conclusion of the review process.

13.0 APPEAL RIGHTS

13.1 Debriefing Process

- 13.1.1 Upon completion of the review, the County shall notify the remaining Respondents in writing that the County is entering negotiations with another Respondent. Upon receipt of the letter, any non-selected Respondent may submit a written request for a Debriefing within the timeframe specified in the letter. A request for a Debriefing may, in the County's sole discretion, be denied if the request is not received within the specified timeframe.

- 13.1.2 The purpose of the Debriefing is to compare the requesting Respondent's Response to the Solicitation document with the review document. The requesting Respondent shall be debriefed only on its Response. Because Work Order negotiations are not yet complete, Responses from other Respondents shall not be discussed, although the County may inform the requesting Respondent of its relative ranking.
- 13.1.3 During or following the Debriefing, the County will instruct the requesting Respondent of the manner and timeframe in which the requesting Respondent must notify the County of its intent to request an Appeal (see Section 13.2 - Appeal below), if the requesting Respondent is not satisfied with the results of the Debriefing.

13.2 Appeal

The County will consider any appeal regarding Respondents not recommended for award of a Work Order under this WOS, if such appeal would change the outcome of the Work Order award selection and is received in writing by the DHS Contracts and Grants Division by the date specified in the non-selected letter. An appeal may, in DHS' sole discretion be denied if the request does not satisfy all of the following criteria.

- 13.2.1 The person or entity request an appeal is a Respondent.
- 13.2.2 The request for an appeal is submitted timely (i.e., by the date and time specified by DHS);
- 13.2.3 The person or entity appealing asserts, in appropriate detail with factual reasons, one or more of the following grounds for review:
- A. DHS materially failed to follow procedures specified in its WOS. This includes:
 - 1. Failure to correctly apply the standards for reviewing the Response format requirements.
 - 2. Failure to correctly apply the standards and/or follow the prescribed methods, for reviewing the Responses as specified in the WOS.
 - 3. Use of review criteria that was different from the review criteria disclosed in the WOS.
 - B. A member of the Review Committee demonstrated bias in the conduct of the review.

- C. Another basis for review as provided by State or Federal law.

Respondents will be notified by the Director of the decision on any appeal which is received by DHS in a timely manner. Such notification will explain the basis for the decision. The Director's decision on any appeal will be final.

14.0 WORK ORDER

A Work Order will be executed with the selected Respondent(s) as authorized under delegated authority by the County's Board of Supervisors. The Statement of Work to the Work Order, shall be agreed upon by the selected Respondent(s) and the County, based on the Respondent's response.

15.0 NOTICE TO RESPONDENTS REGARDING THE PUBLIC RECORDS ACT

- 15.1 Responses to this solicitation shall become the exclusive property of the County.
- 15.2 Exceptions to disclosure are those parts or portions of all Respondents that are justifiably defined as business or trade secrets, and plainly marked by the Respondent as "Trade Secret", "Confidential", or "Proprietary".
- 15.3 The County shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the California Public Records Act or otherwise by law. **A blanket statement of confidentiality or the marking of each page of the Response as confidential shall not be deemed sufficient notice of exception. The Respondents must specifically label only those provisions of their respective Response which are "Trade Secrets", "Confidential", or "Proprietary" in nature.**
- 15.4 In the event the County is required to defend an action on a Public Records Act request for any of the aforementioned documents, information, books, records, and/or contents of a Response marked "confidential," "trade secrets," or "proprietary," Respondent agrees to defend and indemnify County from all costs and expenses, including reasonable attorneys' fees, incurred in connection with any action, proceedings, or liability arising in connection with the Public Records Act request.

16.0 COUNTY RIGHTS AND RESPONSIBILITIES

The County has the right to amend, re-issue, or cancel this WOS by written addendum. The County is responsible only for that, which is expressly stated in this solicitation document and any authorized written addenda thereto. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the Response not being

