



County of San Mateo

Request for Proposals (RFP) for Request for Proposal for Call Center Services

Health - Aging and Disability Services

RFP No. TBD

RFP Contact: Elaine Wang
ewang1@smcgov.org

1. Introduction and Schedule

The County of San Mateo (the “County” or “SMC”) covers most of the San Francisco Peninsula. The region covers 744 mi and is home to nearly 800,000 residents and 20 incorporated cities. The County provides for the health and welfare of all people within its borders and serves as the local government for the unincorporated areas. Innovation thrives here in industries including bioscience, computer software, green technology, hospitality, financial management, health care, education and transportation. The County prides itself on how that prosperity fosters its commitment to protecting and enhancing the health, safety, welfare and natural resources of the community.

1.1. Summary

San Mateo County Aging and Disability Services (ADS) is soliciting proposals from qualified firms to provide call center services in support of ADS operations. The selected contractor shall provide professional, responsive, and reliable call center services for inbound and outbound communications, including after-hours, weekend, holiday, and business hour overflow coverage, as required by the County. The contractor shall ensure service continuity, accurate message intake and relay, and compliance with all applicable legal and operational requirements.

1.2. Background

Aging and Disability Services (ADS): San Mateo County ADS is a division of San Mateo County Health . The Division provides a wide range of services to assist seniors, people with disabilities and dependent adults to live safely and independently in the community, as well as services associated with administering the estates of deceased persons for whom there is no one able or willing to serve as administrator. With regard to services to seniors, ADS’s overall goal is to develop an integrated long-term supportive services system for older adults and adults with disabilities that is person-centered and responsive to the individual needs of older adults and adults with disabilities, focused on coordinated home and community-based services to maintain individuals in community settings, and flexible in its use of resources while reducing administrative duplication, complexity and fragmentation. The Division provides direct services which include centralized intake and referral; assessment and consultation; protective and supportive services and case management.

1.3. Contact Information

Project Contact:

Elaine Wang

Contract Administrator II

Email: ewang1@smcgov.org

Phone: [\(650\) 713-8598](tel:(650)713-8598)

Procurement Contact:

Elaine Wang

Contract Administrator II

Email: ewang1@smcgov.org

Phone: [\(650\) 713-8598](tel:(650)713-8598)

Department:

Health - Aging and Disability Services

Department Head:
Colleen Chawla
Chief, San Mateo County Health

1.4. Timeline

RFP Released	August 10, 2026
Pre-Proposal Meeting (Mandatory)	August 27, 2026, 11:00am Teams, please contact Elaine Wang at ewang1@smcgov.org
Deadline for Questions and Comments	September 11, 2026, 5:00pm
Proposal Due Date and Time	September 18, 2026, 5:00pm
Potential Demo	October 2, 2026, 2:00pm
Anticipated Contract Award Date	December 1, 2026

2. Scope of Work

2.1. Scope of Work for Call Center Services

San Mateo County Aging and Disability Services is soliciting proposals from qualified businesses to provide call center services. The selected contractor shall provide professional, responsive, and reliable call center services for inbound and outbound communications, including after-hours coverage, weekend and holiday coverage, and overflow support during regular business hours, as requested by the County. The contractor shall ensure accurate message intake and transmission, continuity of service, and compliance with all applicable legal, operational, and confidentiality requirements.

Specifications

The call center services must meet the following specifications:

A. Call Handling

- A. Manage inbound and outbound calls, including, but not limited to, general inquiries, service requests, follow-up communications, and other call types identified by the County.
- B. Receive, document, and relay caller messages to designated ADS staff by email or another County-approved method, as appropriate to the nature of the call.

- C. Ensure that all message information transmitted to ADS is complete, legible, and verified for accuracy prior to delivery.
- D. Answer all calls in a timely, courteous, and professional manner consistent with County-approved service standards.
- E. Provide after-hours, weekend, holiday, and overflow call coverage as required by the County.
- F. In situations that appear to involve an immediate threat to life or safety, instruct callers to dial 911 and follow County-approved scripts and escalation procedures.
- G. Escalate calls involving suspected abuse, urgent safety concerns, or other emergent situations to ADS within one (1) hour, or sooner if required by County protocol.
- H. Maintain procedures to support consistent call handling, accurate message intake, and appropriate routing of urgent and non-urgent matters.
- I. Provide multilingual support at a minimum in English and Spanish; Contractor should maintain and implement a language access plan to support participants with language needs beyond English and Spanish.
- J. Ensure call center personnel are trained to handle a range of call types, including customer service inquiries, urgent situations, confidentiality requirements, and County-specific procedures.
- K. Provide equal communication access by 1). Accept relay calls. Call center staff must be trained to receive and process inbound calls via the California Relay Services (CRS) or 711. 2). Prohibit "hand-ups". Agents cannot disconnect or refuse a call simply because a Communications Assistant (CA) or text-to-speech software is translating the user's side of the conversation. 3). Equivalency in wait times. Hearing impaired callers using TTY or video relay systems cannot be subjected to longer wait times, separate queues, or poorer service quality compared to voice callers. 4). Accessible IVR/Phone trees: Automated phone menus must feature options compatible with TTY software or offer clear paths or move directly to a real person.

B. Technology and Infrastructure

- A. Utilize a reliable call center platform that supports call routing, queue management, call recording where permitted by law, and real-time operational monitoring.
- B. Maintain systems and infrastructure sufficient to support continuous, dependable, and secure call center operations.
- C. Ensure that all systems used in performance of the services comply with applicable privacy and security requirements, including HIPAA where applicable to the handling of protected health information.
- D. Maintain appropriate business continuity and disaster recovery capabilities to minimize service disruption and support continuity of operations.

C. Reporting and Analytic

- A. Provide ADS with a summary of all overnight calls no later than the beginning of the next County business day.
- B. Provide detailed monthly reports that include, at a minimum, call volume, call types, response times, escalation activity, disposition or resolution information, and customer satisfaction information.
- C. Participate in periodic performance review meetings and provide recommendations for service improvements upon request.

D. Security and Compliance

- A. Implement administrative, technical, and physical safeguards to protect confidential, sensitive, and protected information.
- B. Comply with all applicable federal, state, and local laws, regulations, and County requirements related to privacy, security, accessibility, and service delivery.
- C. Conduct regular security reviews or audits and provide related documentation or summary reports to ADS upon request.

Service Requirements

The vendor must meet the following service requirements:

A. Availability

- A. Provide call center operations twenty-four (24) hours per day, seven (7) days per week, and three hundred sixty-five (365) days per year, including holidays. Below is a list of current San Mateo County holidays:

New Year's Day
Martin Luther King Jr. Day
Presidents' Day
Cesar Chavez Day
Memorial Day
Juneteenth
Independence Day
Labor Day
Veterans Day
Thanksgiving Day
Day After Thanksgiving
Christmas Day

- B. Maintain a minimum service uptime of 99.9%, excluding County-approved scheduled maintenance.

B. Staffing

- A. Maintain staffing levels sufficient to manage routine operations, peak call volumes, seasonal fluctuations, and unexpected surges in demand.
- B. Provide ongoing training and professional development for call center personnel assigned to County services.
- C. Assign a dedicated account manager to serve as the primary point of contact for ADS on contract administration, operational coordination, and issue resolution.

C. Quality Assurance

- A. Maintain a comprehensive quality assurance program that includes call monitoring, regular performance evaluations, coaching, and corrective action as needed.
- B. Provide ADS with access to call recordings, quality assurance reports, and related performance documentation, subject to applicable legal and confidentiality requirements.

D. Customer Support

- A. Provide a dedicated support function to address operational issues, service concerns, and County inquiries in a timely and professional manner.
- B. Maintain a clear escalation process for unresolved issues, service interruptions, and urgent operational concerns.

Delivery Requirements

The vendor must adhere to the following delivery requirements:

A. Implementation Timeline

- A. Submit a detailed implementation plan within two (2) weeks of contract award.
- B. Complete implementation of call center services and be prepared for go-live within sixty (60) days of contract award, unless otherwise approved by the County.

B. Training

- A. Provide comprehensive training for call center personnel prior to the go-live date.
- B. Provide ongoing training and refresher sessions to ensure personnel remain current on County requirements, scripts, procedures, escalation protocols, and service updates.

C. Testing and Validation

- A. Conduct thorough testing of all call center systems, workflows, routing protocols, and operational processes prior to the go-live date.

- B. Provide the County with a testing and validation report summarizing testing activities, results, identified issues, and corrective actions taken.

D. Go-Live Support

- A. Provide on-site or remote support during the initial go-live period to address implementation issues and operational concerns in a timely manner.
- B. Ensure an orderly transition to full operational status with minimal disruption to County services.

Performance Measures

- A. Maintain system uptime of at least 99.99% to support reliable call center operations, excluding County-approved scheduled maintenance.
- B. Answer at least 95% of all calls within three (3) rings.
- C. Maintain 100% complete and accurate message documentation and transmission to ADS.
- D. Achieve a customer satisfaction score of 90% or higher.

Conclusion

The County of San Mateo is committed to providing responsive, high-quality service to the community. The selected contractor will play an important role in supporting this objective by delivering reliable, professional call center services that meet County expectations. Proposals should clearly demonstrate the proposer's ability to satisfy the specifications, service requirements, and delivery requirements set forth in this Scope of Work. The County seeks to partner with a qualified firm that shares its commitment to service excellence, operational reliability, and customer satisfaction.

3. Submission Requirements

3.1. Submission Deadline

Proposals must be electronically received by 5:00 pm, on Friday, September 18, 2026 via eProcurement system.

Allow sufficient time for the upload to complete by the Due Date and Time. Partial uploads will automatically terminate, and proposals will be rejected. The eProcurement system submission time will be the official submission time. The County will not be responsible for and may not accept proposals that are late due to slow internet connections or for any other failure of the eProcurement system.

NOTE: The County does not maintain the eProcurement system and is not liable for site failures or technical problems. To resolve technical issues, contact OpenGov Technical Support by using the real time chat located in the lower right hand corner of the screen, or via email at procurement-support@opengov.com

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

3.2. Pre-submission Registration

Organizations or individuals interested in responding to this solicitation must register online with the County of San Mateo [at](#):

- <https://procurement.opengov.com/portal/smcgov>

It is recommended that organizations complete this registration as soon as possible. The County will not be responsible for and may not accept proposals that are late due to a failure to register in the eProcurement system.

3.3. Submission via eProcurement Portal

Required Documents

Please refer to the [Technical Proposal](#) section for submittal documents and requirements.

Electronic Submissions

Include the proposer name and the RFP title and number in each filename. Submit proposals via the eProcurement website, allowing sufficient time for the upload to complete by the Due Date and Time. As noted above, the eProcurement portal submission time will be the official submission time, and partial uploads will automatically terminate, and proposals will be rejected. Contact [eProcurement Portal](#) with technical questions regarding this site.

Conflicts between Certain Requirements

Prior to the submission deadlines and solely relating to a determination of the timeliness of questions, comments, and proposal submissions, information displayed on the eProcurement portal site will take precedence in the event of a discrepancy between that information and the information within the solicitation documents. For all other discrepancies, the information in the solicitation documents will take precedence.

Format

Documents should be created in the following format:

- Text should be Times New Roman (12-point minimum font size) and unjustified (i.e., with a ragged-right margin)
- Pages should have margins of at least one inch on all sides (excluding headers and footers)
- If the proposal is lengthy, a Table of Contents should be included.
- PDF format is preferred.

Errors in Proposals

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are late, incomplete, missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any remaining RFP requirements.

3.4. Procurement Preference for Local Businesses and Local Non-Profits

The County of San Mateo has adopted a Procurement Preference for Local Businesses Ordinance (County Ord. Code Ch. 2.89.) The purpose of this Ordinance is to promote a strong local economy by giving preference to local businesses, local non-profits, local small and micro businesses, and local small and micro non-profits in County procurements, to the extent consistent with the law and interests of the public. The County's process for applying local preferences to competitive procurements is set forth in County Ordinance Code Section 2.89.030. The Ordinance and exemptions (e.g. the ordinance will be exempt when all bids or proposals received are from Non-Profit Organizations) can be reviewed here:

[Chapter 2.89 - PROCUREMENT PREFERENCE FOR LOCAL BUSINESSES | Code of Ordinances | San Mateo County, CA | Municode Library](#)

The requirements for bidders to establish eligibility for a local preference for this solicitation are detailed below in Section III (Submission Requirements) The Ordinance does not apply if a procurement is determined to be exempt (County Ord. Code sec. 2.89.050), and the County reserves the right to waive application of the Ordinance to this procurement if determined to be in the best interests of the County (County Ord. Code sec. 2.89.060).

4. Minimum Qualifications, Local Preference Ordinance, and Technical Proposal

4.1. Minimum and Desired Qualifications

4.1.1. MQ: Has Proposer has been providing similar services for a minimum of four (4) years within the last seven (7) years?*

☐ Yes

☐ No

*Response required

4.1.2. MQ: Account manager has a minimum of two (2) years of experience within the last five (5) years in providing account services?*

☐ Yes

☐ No

*Response required

4.1.3. MQ: Please confirm your firm is registered with System for Award Management (SAM)*

[SAM.gov](https://sam.gov)

It is acceptable for the proposer to be in the process of registering with SAM.gov at the time of application; however, registration must be completed before the contract start date. It is required that proposer has not been suspended or debarred from entering into contracts with any other government agencies due to misconduct or other reasons.

☐ Please confirm

*Response required

4.1.4. MQ: What is the registered Business Name and Unique Entity ID (UEI) No.?*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

*Response required

4.1.5. DQ: Does the proposer possess a current SOC 2 Type II certification or SOC 2 Type II attestation report covering the services proposed under this solicitation?

- ☐ Yes
☐ No

4.2. Procurement Preference for Local Businesses and Local Non-Profits

4.2.1. Is the Proposer a "Local Business"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

4.2.2. Is the Proposer a Non-Profit?*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

- ☐ Yes
☐ No

*Response required

When equals "Yes"

4.2.3. Is the Proposer a "Local Non-Profit"

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Non-Profit" means a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes, and has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

4.2.4. Is the Proposer a Local "Small" or "Micro" Business?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Business” means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

“Micro Business” means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

4.2.5. Is the Proposer a Local "Small" or "Micro" Non-Profit?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Non-Profit” means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

“Micro Non-Profit” means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

4.3. Technical Proposal

4.3.1. Introduction and Executive Summary *

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

*Response required

4.3.2. Project Approach- Specifications*

Please describe how your firm plans to meet the below specifications outlined in the **Scope of Work** section.

A. Call Handling

- A. Manage inbound and outbound calls, including, but not limited to, general inquiries, service requests, follow-up communications, and other call types identified by the County.

- B. Receive, document, and relay caller messages to designated ADS staff by email or another County-approved method, as appropriate to the nature of the call.
- C. Ensure that all message information transmitted to ADS is complete, legible, and verified for accuracy prior to delivery.
- D. Answer all calls in a timely, courteous, and professional manner consistent with County-approved service standards.
- E. Provide after-hours, weekend, holiday, and overflow call coverage as required by the County.
- F. In situations that appear to involve an immediate threat to life or safety, instruct callers to dial 911 and follow County-approved scripts and escalation procedures.
- G. Escalate calls involving suspected abuse, urgent safety concerns, or other emergent situations to ADS within one (1) hour, or sooner if required by County protocol.
- H. Maintain procedures to support consistent call handling, accurate message intake, and appropriate routing of urgent and non-urgent matters.
- I. Provide multilingual support at a minimum in English and Spanish; Contractor should maintain and implement a language access plan to support participants with language needs beyond English and Spanish.
- J. Ensure call center personnel are trained to handle a range of call types, including customer service inquiries, urgent situations, confidentiality requirements, and County-specific procedures.
- K. Provide equal communication access by 1). Accept relay calls. Call center staff must be trained to receive and process inbound calls via the California Relay Services (CRS) or 711. 2). Prohibit "hand-ups". Agents cannot disconnect or refuse a call simply because a Communications Assistant (CA) or text-to-speech software is translating the user's side of the conversation. 3). Equivalency in wait times. Hearing impaired callers using TTY or video relay systems cannot be subjected to longer wait times, separate queues, or poorer service quality compared to voice callers. 4). Accessible IVR/Phone trees: Automated phone menus must feature options compatible with TTY software or offer clear paths or move directly to a real person.

B. Technology and Infrastructure

- A. Utilize a reliable call center platform that supports call routing, queue management, call recording where permitted by law, and real-time operational monitoring.
- B. Maintain systems and infrastructure sufficient to support continuous, dependable, and secure call center operations.
- C. Ensure that all systems used in performance of the services comply with applicable privacy and security requirements, including HIPAA where applicable to the handling of protected health information.

- D. Maintain appropriate business continuity and disaster recovery capabilities to minimize service disruption and support continuity of operations.

C. Reporting and Analytic

- A. Provide ADS with a summary of all overnight calls no later than the beginning of the next County business day.
- B. Provide detailed monthly reports that include, at a minimum, call volume, call types, response times, escalation activity, disposition or resolution information, and customer satisfaction information, if collected.
- C. Participate in periodic or quarterly performance review meetings and provide recommendations for service improvements upon request.

D. Security and Compliance

- A. Implement administrative, technical, and physical safeguards to protect confidential, sensitive, and protected information.
- B. Comply with all applicable federal, state, and local laws, regulations, and County requirements related to privacy, security, accessibility, and service delivery.
- C. Conduct regular security reviews or audits and provide related documentation or summary reports to ADS upon request.

*Response required

4.3.3. Project Approach-Specifications (Call Center Technology) and use of Artificial Intelligence (AI)*

Describe the call center technology platform you propose to use.

Please also let us know if your system includes the following capabilities.

- A. Automatic call distribution
- B. Interactive voice response
- C. Skills-based routing
- D. Call recording
- E. Callback
- F. Voicemail
- G. Queue management
- H. Real-time dashboards
- I. Secure reporting

- J. Multilingual routing
- K. SMS, email, chat, or other channels, if applicable

Please let us know whether your call center services include any AI-integrated features or tools.

If yes, please briefly describe:

- A. The AI functionality provided
- B. How it is used in call center operations
- C. Whether any customer or caller data is processed by the AI
- D. Any safeguards, privacy controls, or compliance measures in place

*Response required

4.3.4. Project Approach- Specifications (Reporting)

Provide sample reports or dashboard screenshots from a similar engagement, with confidential information removed. Describe your process for validating report accuracy and resolving data discrepancies.

4.3.5. Project Approach- Service Requirements

Please describe how your firm plans to meet the below service requirements outlined in the **Scope of Work** section.

A. Availability

- A. Provide call center operations twenty-four (24) hours per day, seven (7) days per week, and three hundred sixty-five (365) days per year, including holidays. Below is a list of current San Mateo County Holidays:

- New Year's Day
- Martin Luther King Jr. Day
- Presidents' Day
- Cesar Chavez Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Day After Thanksgiving
- Christmas Day

B. Maintain a minimum service uptime of 99.9%, excluding County-approved scheduled maintenance.

B. Staffing

- A. Maintain staffing levels sufficient to manage routine operations, peak call volumes, seasonal fluctuations, and unexpected surges in demand.
- B. Provide ongoing training and professional development for call center personnel assigned to County services.
- C. Assign a dedicated account manager to serve as the primary point of contact for ADS on contract administration, operational coordination, and issue resolution.

C. Quality Assurance

- A. Maintain a comprehensive quality assurance program that includes call monitoring, regular performance evaluations, coaching, and corrective action as needed.
- B. Provide ADS with access to call recordings, quality assurance reports, and related performance documentation, subject to applicable legal and confidentiality requirements.

D. Customer Support

- A. Provide a dedicated support function to address operational issues, service concerns, and County inquiries in a timely and professional manner.
- B. Maintain a clear escalation process for unresolved issues, service interruptions, and urgent operational concerns.

4.3.6. Project Approach- Service Requirements (Quality Assurance)*

Describe your quality assurance program, including the percentage or number of calls reviewed, scoring methodology, reviewer qualifications, and feedback process. In addition, please provide a sample quality assurance scorecard.

*Response required

4.3.7. Project Approach- Delivery Requirements

Please describe how your firm plans to meet the below delivery requirements outlined in the **Scope of Work** section.

A. Implementation Timeline

- A. Submit a detailed implementation plan within two (2) weeks of contract award.
- B. Complete implementation of call center services and be prepared for go-live within sixty (60) days of contract award, unless otherwise approved by the County.

B. Training

- A. Provide comprehensive training for call center personnel prior to the go-live date.
- B. Provide ongoing training and refresher sessions to ensure personnel remain current on County requirements, scripts, procedures, escalation protocols, and service updates.

C. Testing and Validation

- A. Conduct thorough testing of all call center systems, workflows, routing protocols, and operational processes prior to the go-live date.
- B. Provide the County with a testing and validation report summarizing testing activities, results, identified issues, and corrective actions taken.

D. Go-Live Support

- A. Provide on-site or remote support during the initial go-live period to address implementation issues and operational concerns in a timely manner.
- B. Ensure an orderly transition to full operational status with minimal disruption to County services.

4.3.8. Performance Measures*

Please describe how your firm plans to meet the below performance measures outlined in the **Scope of Work** section.

- A. Maintain system uptime of at least 99.99% to support reliable call center operations, excluding County-approved scheduled maintenance.
- B. Answer at least 95% of all calls within three (3) rings.
- C. Maintain 100% complete and accurate message documentation and transmission to ADS.
- D. Achieve a customer satisfaction score of 90% or higher.

*Response required

4.3.9. Pricing

Please use the pricing table under section 4. Pricing Proposal to provide requested information. In this section, please tell us:

Provide a complete pricing schedule identifying all one-time, recurring, usage-based, optional, pass-through, after-hours, surge, technology, language access, reporting, integration, transition, and termination costs. State all pricing assumptions.

How many minutes or calls are included in your monthly base fee? What is the exact penalty rate if your volume spikes during an unexpected holiday rush?

Please outline any additional pricing details that would help us better understand your overall pricing structure, including any assumptions, optional costs, discounts, fees, or conditions not already described.

4.3.10. Innovations*

Reference any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

*Response required

4.3.11. Firm and Team Qualifications *

Firm qualifications: Attach information regarding background and qualifications, including the following:

- A. A brief description of the proposer.
- B. A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- C. If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

Team qualifications: Provide a chart identifying:

- A. Project team and reporting structure
- B. Lead project manager
- C. Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County's prior approval

*Response required

4.3.12. References*

Provide 3 references for each of the following, including the name, address, and telephone number of recent clients (preferably other public agencies):

*Response required

5. Pricing Proposal

Please provide additional pricing information under Technical Proposal question 3.11. Please use the below pricing table to provide the information requested.

YEAR ONE

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1.	One-time set up fee (if applicable)	1	US Dollars		
2.	Charge per minute (if applicable)	1	US Dollars		
3.	Charge per call (if applicable)	1	US Dollars		
4.	Charge per-agent (if applicable)	1	US Dollars		
5.	Extra charges per minute or per call during holidays such as Thanksgiving, Christmas, and New Year's Eve.	1	US Dollars		
6.	Other fees (please describe)	1	US Dollars		
TOTAL					

YEAR TWO

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1.	One-time set up fee (if applicable)	1	US Dollars		
2.	Charge per minute (if applicable)	1	US Dollars		
3.	Charge per call (if applicable)	1	US Dollars		
4.	Charge per-agent (if applicable)	1	US Dollars		
5.	Extra charges per minute or per call during holidays such as Thanksgiving, Christmas, and New Year's Eve.	1	US Dollars		
6.	Other fees (please describe)	1	US Dollars		
TOTAL					

YEAR THREE

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1.	One-time set up fee (if applicable)	1	US Dollars		
2.	Charge per minute (if applicable)	1	US Dollars		
3.	Charge per call (if applicable)	1	US Dollars		
4.	Charge per agent (if applicable)	1	US Dollars		
5.	Extra charges per minute or per call during holidays such as Thanksgiving, Christmas, and New Year's Eve.	1	US Dollars		
6.	Other fees (please describe)	1	US Dollars		
TOTAL					

6. Evaluation and Selection Criteria

The proposals will be evaluated by a selection committee with relevant expertise. The County intends to evaluate the proposals generally in accordance with the criteria itemized below. Proposers with the highest scoring proposals may be interviewed by the committee to make the final selection.

6.1. Phase 1

No.	Evaluation Criteria	Scoring Method	Weight (Points)
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1.	Project Approach Ratings should be based on: A. Quality and responsiveness of overall proposal: The proposal is complete, well-organized, and responsive to all requirements outlined in the Scope of Work, including specifications, service requirements, and delivery requirements. B. Alignment with County needs: The proposal clearly describes a methodology that is responsive to the County’s needs and demonstrates an effective approach to delivering the required services. C. Clarity and completeness of project approach: The proposal provides clear, thorough, and well-organized details, including a comprehensive, practical, and feasible project approach.	Points Based	45 (45% of Total)
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2.	Firm and team Qualifications Ratings should be based on: A. Quality of firm qualifications response: The proposal provides a complete, clear, and well-organized response to the Firm Qualifications question in the Technical Proposal section. B. Organizational and staff qualifications: The proposer's organization and proposed staffing plan demonstrate the experience, qualifications, and capacity necessary to provide the required services successfully. C. Relevant experience and business history: The proposer demonstrates sufficient experience providing call center services, including consideration of the length of time the proposer has been in business. D. Quality and relevance of references: The proposal includes strong, relevant references that demonstrate successful performance on similar engagements, including prior government contracts where applicable. E. Ability to provide required call center services: The proposal demonstrates the proposer's ability to perform call center services identified in the Scope of Work.	Points Based	20 (20% of Total)
3.	Performance measures Ratings should be based on: Ability to meet performance expectations: The proposal demonstrates the proposer's ability to meet or exceed the performance measures and service standards established in the Scope of Work.	Points Based	10 (10% of Total)

4.	Price Ratings should be based on: A. Clarity and completeness of pricing: The proposal provides a clear, thorough, and well-organized pricing structure, including a complete and easy-to-understand pricing table. B. Fairness, reasonableness, and competitiveness of proposed pricing: The proposed pricing is fair, reasonable, and competitive, and reflects appropriate value in relation to the scope of services described in the technical proposal. C. Overall value to the County: The proposal demonstrates that the County will receive strong value for the services required.	Points Based	25 (25% of Total)
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6.2. Phase 2

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Preferential Points Where price is not the sole evaluation factor for a solicitation (e.g., in the case of a "best-value" solicitation), five percent (5%) of the total evaluation points otherwise awardable will be added to the proposal score for each Local Business or Local Non-Profit score for evaluation purposes. In the event of a tie between a Local Business or Local Non-Profit and another bidder, the Local Business or Non-Profit shall be awarded the Contract, assuming agreement on other contract terms. An additional three percent (3%) preference shall be given to a Local Business or Local Non-profit (for a total of eight percent (8%) of total points otherwise awardable) if the proposer is a Small Business or Small Non-Profit, or an additional 5 percent preference (for a total of ten percent (10%) of total points otherwise awardable) if the proposer is a Micro Business or Micro Non-Profit.	Points Based	10 (100% of Total)

7. Instructions to Proposers

7.1. Instructions

Proposers are encouraged to attend a pre-proposal conference on Thursday, August 27, 2026, at 11:00 am, to be held at Teams, please contact Elaine Wang at ewang1@smcgov.org. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please post them on the eProcurement portal.

7.2. Communications

- A. As of the issuance date of this RFP and continuing until it is canceled or an award is made, no proposer or person acting on behalf of a prospective proposer may discuss any matter relating to the RFP with any officer, agent, or employee of the County, other than through eProcurement portal, to the Authorized Contact Person, or as outlined in the evaluation or protest procedures.
- B. Proposers (including any agent, owner, employee, board members, or other such affiliates) shall not offer any gift, favor, or other personal benefit to any County officer or employee during the procurement process for this agreement, including during the solicitation period and contract negotiations.

Violation of the foregoing prohibitions may result in a proposer being found non-responsible and barred from participating in this or future procurements.

7.3. Contract Award

A. Award Procedure

Contract negotiations are neither an offer nor guarantee that a contract will be executed. A contract award, if any is made, will be to the responsive, responsible proposer offering the overall best value to the County for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement using the attached template, executed by the appropriate authority.

B. Notice of Intent to Award

If a decision is made to take steps to enter into an agreement with one or more proposers, the County will post a Notice of Intent to Award or otherwise notify proposers the remaining proposers of their non-selection. Notice may instead be provided by including approval of the agreement as an item on an agenda for a meeting of the Board of Supervisors.

C. Commencement of Performance

After all parties have signed the agreement, the County will notify the contractor and performance may proceed. Prior to execution of the agreement by the County, no County employee may authorize work under the agreement. Any work performed prior to the full execution of the Agreement may not be compensated.

- D. **Levine Act Disclosure** The Levine Act (California Government Code Section 84308) imposes certain requirements on parties contracting with the County of San Mateo related to campaign contributions to County “officers,” including elected County officers and candidates seeking

elective office, who may participate in making a decision on certain County contracts. Elected County officers in San Mateo County include: the San Mateo County Board of Supervisors, Assessor-County Clerk-Recorder, County Controller, Coroner, District Attorney, Sheriff, and Tax Collector-Treasurer. Generally, under current County policy, approval by the Board of Supervisors is required for any agreement for services above \$200,000, and agreements for services below that threshold may be approved by Department heads. **If your proposal is selected, you will be required to certify compliance with the Levine Act.** As part of this process, you will need to certify and warrant that you have fully complied, and will remain in full compliance, with all applicable requirements of the Levine Act in connection with the Agreement, including making any required disclosures of campaign contributions to County Officers, which includes but may not be limited to elected County Officers. Elected County Officers include members of the San Mateo County Board of Supervisors, as well as the Assessor-County Clerk-Recorder, Controller, Coroner, District Attorney, Sheriff, and Tax Collector-Treasurer. Any campaign contribution required to be disclosed under the Levine Act in connection with this Agreement shall be disclosed on the County of San Mateo Levine Act Disclosure Form, a copy of which is available from the County upon request. Parties are solely responsible for accurate certification and disclosure. The Levine Act is complex, and this brief description is not legal advice. For example, certain contributions must be aggregated when determining whether contributions have exceeded the \$500 threshold. If your proposal is selected, you are urged to review the Levine Act and consider consulting an attorney.

7.4. Term

Health - Aging and Disability Services is issuing Request for Proposal (RFP) No. TBD for Request for Proposal for Call Center Services.

The agreement shall have a term of three (3) years. In addition, the County shall have one (1) option to extend the term for an additional period not to exceed two years, which the County may exercise in its sole, absolute discretion. To exercise this option, the County shall provide written notice to the Contractor at least thirty days before the end of the agreement's term.

The County's standard contract template has been included with this solicitation. The awarded contractor will be expected to sign an agreement prepared by the County using this template. Please ensure that your firm has completed legal review of these contract terms. If your firm wishes to request exceptions to these standard terms, submit a Contract Exceptions Request by the Deadline for Questions, Comments and Contract Exceptions listed in the Solicitation Schedule below. The County will consider Contract Exceptions Requests but reserves the right to reject requested modifications to its standard terms.

8. Terms and Conditions for Receipt of Proposals

8.1. Errors, Omissions and Inquiries regarding the RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to notify the department, in eProcurement portal, if the proposer discovers any ambiguity, discrepancy, omission, or apparent error in the RFP. Such notification should be made promptly after discovery, but in no event later than five

business days prior to the deadline for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

Inquiries regarding the RFP should be lodged in eProcurement portal.

8.2. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the department, via eProcurement portal, setting forth with specific grounds for the objection.

8.3. Addenda

The County may cancel, revise, or reissue this RFP, in whole or in part, for any reason. Revisions will be posted as Addenda on eProcurement portal. No other revision of this RFP is valid. Proposers shall be responsible for ensuring that their proposals reflects any and all Addenda issued by the County prior to the proposal due date regardless of when a proposal is submitted. Therefore, the County recommends that proposers consult eProcurement portal frequently, including shortly before the proposal due date, to confirm that all Addenda have been downloaded.

8.4. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the proposed agreement term and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

8.5. Revision or Withdrawal of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original on or before the proposal due date.

A proposer may withdraw a proposal at any time before the deadline for submission of proposals. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

8.6. Errors and Omissions in Proposal

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are incomplete, are missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any of the remaining RFP requirements.

8.7. No Commitment

Neither submission of a proposal nor the County's receipt of proposal materials confers any right to the proposer nor any obligation on the County. This RFP does not commit the County to award a contract.

8.8. Financial Responsibility

The County shall have no financial responsibility for any costs incurred by a firm in responding to this RFP or participating in any presentations or negotiations.

8.9. Estimated Quantity

If the RFP results in an indefinite quantity or a requirements agreement, the goods and services actually requested by the County may be less than the maximum value of the agreement and there is no guarantee, either expressed or implied, as to the actual quantity of goods and services that will be authorized under the agreement.

8.10. Public Record

A. General

1. All proposals, protests, and information submitted in response to this solicitation will become the property of the County and will be considered public records. As such, they may be subject to public review.
2. Any contract arising from this RFP will be a public record.
3. The County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer.
4. Submission of any materials in response to this RFP constitutes:
 - Consent to the County's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and
 - Waiver of all claims against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
 - Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and
 - Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

8.11. Confidential Information

- A. Proposers are responsible for asserting any applicable privileges or reasons why a document should not be produced in response to a public record request.
- B. If submitting information protected from disclosure as a trade secret or any other basis, identify each page of such material subject to protection as "CONFIDENTIAL." If requested material has been designated as confidential, the County will attempt to inform the proposer of the public records request in a timely manner to permit assertion of any applicable privileges.
- C. Failure to seek a court order protecting information from disclosure within ten days of the County's notice of a request to the proposer will be deemed agreement to disclosure of the information and the proposer agrees to indemnify and hold the County harmless for release of such information.

- D. Requests to treat an entire proposal as confidential will be rejected and deemed agreement to County disclosure of the entire proposal and the proposer agrees to indemnify and hold the County harmless for release of any information requested.
- E. Trade secrets will only be considered confidential if claimed to be a trade secret when submitted to the County, marked as confidential, and compliant with Government Code Section 6254.7.

8.12. Reservations of Rights by the County

The issuance of this RFP does not constitute an agreement by the County that any contract will actually be entered into by the County. The County expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all proposals;
- Reissue an RFP;
- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any materials, equipment or services specified in this RFP by any other means; or
- Determine that no project will be pursued.

8.13. No Waiver

No waiver by the County of any provision of this RFP shall be implied from any failure by the County to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

8.14. Cooperative Agreement (Piggyback)

This competitive solicitation is being conducted as a Cooperative Procurement. The services, terms and conditions of any agreement resulting from this solicitation may be used by other organizations as a Cooperative Agreement.

This provision in no way commits any affiliate to procure services from any awarded contractor, nor does it guarantee that any additional orders will result. At their discretion, and subject to their own procurement policies, interested organizations may make use of this competitive procurement and contract directly from the awarded contractor.

9. Protest Procedures

9.1. Protest of Non-Responsiveness Determination

Within five (5) working days of the County's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the County has incorrectly determined that its proposal is non-

responsive may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day following the County's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

9.2. Protest of Contract Award

Within five (5) working days of the County's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the County has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day after the County's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

9.3. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Protests@smcgov.org

Subject: Request for Proposal for Call Center Services, TBD