



THE COUNTY OF GALVESTON

**FRANK RODRIGUEZ
PURCHASING AGENT**

COUNTY COURTHOUSE
722 Moody (21st Street)
Fifth (5th) Floor
Galveston, Texas 77550
(409) 770-5371

October 13, 2025

Honorable County Judge
And Commissioners' Court
County Courthouse
Galveston, Texas

RE: RFP 25-057, Galveston County Guardianship Program Contract #231127

Gentlemen,

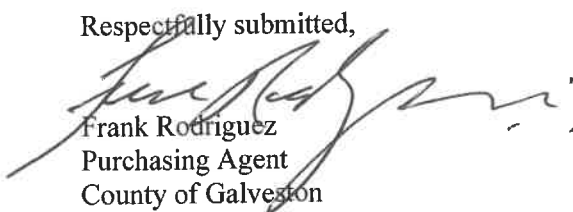
On September 4, 2025 submittals were opened for RFP 25-057, Galveston County Guardianship Program. Two (2) submittals were received from the following companies:

- | | |
|-------------------------------|-------------|
| • Friends for Life | Waco, TX |
| • Back to Eden Fellow Program | Houston, TX |

After a thorough review of the submittal by the Evaluation Committee, Friends for Life was deemed to have submitted a satisfactory proposal and is recommended for award.

Your consideration in this matter will be greatly appreciated.

Respectfully submitted,


Frank Rodriguez
Purchasing Agent
County of Galveston



MEMORANDUM

Date: October 01, 2025

To: Tammy Dickey, Office Manager

From: Christian Monterrubio, Deputy Chief Financial Officer, *CM*

CC: Tashonda Edwards, Indigent Coordinator
Elizabeth Bryant, Fleet Administration – Manager
Jack Ellison, Nuisance Abatement Officer

Subject: RFP #25-057, Guardianship Program

The Evaluation Committee met to review and evaluate the proposals submitted for RFP #25-057, Guardianship Program. Each proposal was carefully considered, and following receipt of the best and final offer submissions, the committee has reached its recommendation.

After thorough discussion and scoring, the Evaluation Committee recommends awarding the contract to Friends for Life. Their proposal demonstrated strong program alignment, organizational capacity, and cost effectiveness, providing the best overall value to Galveston County.

We believe this recommendation will ensure the Guardianship Program continues to deliver quality services that meet the needs of our most vulnerable residents. The committee remains available should you or your office have any questions or require additional details regarding our evaluation process.



Scoring Summary

Active Submissions

	Total	Corporate Experience & History	Methodology for Providing Services	Staffing	Financial capacity
Supplier	/ 100 pts	/ 15 pts	/ 25 pts	/ 20 pts	/ 15 pts
Friends for Life	85.37 pts	15 pts	23 pts	17.75 pts	14 pts
Back to Eden Fellow Program	78.5 pts	13 pts	21.25 pts	14 pts	10.25 pts

	Financial Accountability, reporting and record keeping	Pricing
Supplier	/ 15 pts	/ 10 pts



	Financial Accountability, reporting and record keeping	Pricing
Supplier	/ 15 pts	/ 10 pts
Friends for Life	14.25 pts	1.366 pts (\$275,931.25)
Back to Eden Fellow Program	10 pts	10 pts (\$37,700.00)



Proposal Scores

Back to Eden Fellow Program - Scoring Summary

Evaluation Group 1 - Main Evaluation

	Total	Corporate Experience & History	Methodology for Providing Services	Staffing	Financial capacity
Reviewer	/ 100 pts	/ 15 pts	/ 25 pts	/ 20 pts	/ 15 pts
TASHONDA A EDWARDS	77 pts	10 pts	20 pts	15 pts	10 pts
Elizabeth Bryant	80 pts	15 pts	21 pts	15 pts	10 pts
Christian Monterrubio	86 pts	13 pts	22 pts	16 pts	11 pts
Jack Ellison	65.06 pts	14 pts	22 pts	10 pts	10 pts



	Average:	13 pts	21.25 pts	14 pts	10.25 pts
		↓	↓	↓	↓
Calculated:	78.5 pts	13 pts	21.25 pts	14 pts	10.25 pts

	Financial Accountability, reporting and record keeping	Pricing
Reviewer	/ 15 pts	/ 10 pts
TASHONDA A EDWARDS	12 pts	\$50,000.00
Elizabeth Bryant	9 pts	\$50,000.00
Christian Monterrubio	14 pts	\$50,000.00
Jack Ellison	5 pts	\$800
	10 pts	\$37,700.00



	↓	↓
Calculated:	10 pts	10 pts (\$37,700.00)



Friends for Life - Scoring Summary

Evaluation Group 1 - Main Evaluation

	Total	Corporate Experience & History	Methodology for Providing Services	Staffing	Financial capacity
Reviewer	/ 100 pts	/ 15 pts	/ 25 pts	/ 20 pts	/ 15 pts
TASHONDA A EDWARDS	75.06 pts	15 pts	20 pts	13 pts	14 pts
Elizabeth Bryant	87.66 pts	15 pts	23 pts	18 pts	15 pts
Christian Monterrubio	89.52 pts	15 pts	24 pts	20 pts	14 pts
Jack Ellison	98 pts	15 pts	25 pts	20 pts	13 pts
	Average:	15 pts	23 pts	17.75 pts	14 pts
		↓	↓	↓	↓



Calculated:	85.37 pts	15 pts	23 pts	17.75 pts	14 pts
--------------------	------------------	---------------	---------------	------------------	---------------

	Financial Accountability, reporting and record keeping	Pricing
Reviewer	/ 15 pts	/ 10 pts
TASHONDA A EDWARDS	12 pts	\$472,500.00
Elizabeth Bryant	15 pts	\$301,500.00
Christian Monterrubio	15 pts	\$329,400.00
Jack Ellison	15 pts	\$325
	14.25 pts	\$275,931.25
	↓	↓



Calculated:	14.25 pts	1.366 pts (\$275,931.25)
-------------	-----------	-----------------------------

SPECIAL PROVISIONS

REQUEST FOR PROPOSAL GALVESTON COUNTY GUARDIANSHIP PROGRAM GALVESTON COUNTY, TEXAS

TABLE OF CONTENTS

TABLE OF CONTENTS.....	1
A. PURPOSE.....	2
B. EXCEPTIONS.....	2
C. PROCUREMENT TIMELINE.....	2
D. SUBMISSION INSTRUCTIONS:	3
E. PROPOSAL SURETY	4
F. PERFORMANCE AND PAYMENT BONDS	4
G. BEST AND FINAL OFFERS (BAFO)	4
H. DAVIS-BACON WAGE RATES	4
I. PERSONNEL TO CONTACT	4
J. PROGRAM ADMINISTRATION & CONTRACT MANAGEMENT	5
K. REQUIREMENTS OF REQUEST FOR PROPOSAL	5
L. INSURANCE.....	5
M. GUARDIANSHIP SERVICES:	6
N. PROPOSER DELIVERIES	7
O. ADDITIONAL REQUIREMENTS	9
P. INVOICES:.....	10
Q. EVALUATION AND SELECTION PROCESS.....	11
T. REQUIRED DOCUMENTS CHECKLIST	13

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

The General Provisions and the Special Provisions of this Request for Proposal and the Exhibits attached hereto are made a part of this agreement between the Parties. In the event of a conflict between the General Provisions and the Special Provisions, the terms of the Special Provisions shall control.

****The Galveston County Purchasing Department utilizes Bonfire Interactive to distribute and receive bids and proposals in an electronic format via an online portal. Potential Bidders must register through the online portal to participate electronically.

“Walk-in” or “mailed-in” proposal submittals are still allowed, however, **Bidders are strongly encouraged to submit their proposals online via Galveston County’s e-Procurement Portal located at <https://galvestoncountytx.bonfirehub.com/>.** Please see Item E, SUBMISSION INSTRUCTIONS, for further details.

A. PURPOSE

Galveston County issues this Request for Proposal (RFP) seeking a vendor to provide Guardianship Services to Galveston County. Successful contractor shall comply with all specifications listed in this Request for Proposal.

This invitation for Request for Proposal is open to businesses actively engaged in Guardianship Services. Proof of capability may be required prior to the award of a resultant contract.

B. EXCEPTIONS

Any exceptions to these solicitation conditions should be listed on a separate sheet of paper, attached to respondent’s submittal, and submitted with response at the specified date and time of the solicitation opening.

If no exceptions are stated, **it will be understood that all general and special conditions will be complied with, without exception.**

The Proposer must specify in its Proposal any alternatives it wishes to propose for consideration by the County. Each alternative should be sufficiently described and labeled within the Proposal and should indicate its possible or actual advantage to the program being offered.

The County reserves the right to offer these alternatives to other Proposers.

C. PROCUREMENT TIMELINE

A timeline for this solicitation and initial process is included below. Galveston County reserves the right to change these dates and will notify Respondents of any changes:

Advertise Solicitation (first date of publication)	Wednesday, August 6, 2025
Advertise Solicitation (second date of publication)	Wednesday, August 13, 2025
Deadline for Questions & Inquiries	Wednesday, August 20, 2025, by 5:00 PM CST
Submission Deadline / RFP Opening	Thursday, September 4, 2025, at 2:00 PM CST

Interested parties may attend the Thursday, September 4, 2025, 2:00 PM CST. bid opening virtually by using the following link:

Join from the meeting link:
<https://galvestoncountytx.webex.com/galvestoncountytx/j.php?MTID=m29e034232a2a5f0e0f2d4e56aa7b6952>

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

Join by meeting number Meeting number (access code): 2492 036 9550

Meeting password: 25-057 (250057 when dialing from a video system)

Tap to join from a mobile device (attendees only)
+1-415-655-0001,,24920369550## US Toll

Join by phone+1-415-655-0001 US Toll
Global call-in numbers

Join from a video system or application
Dial 24920369550@galvestoncountytexas.webex.com

You can also dial 173.243.2.68 and enter your meeting number.

D. SUBMISSION INSTRUCTIONS:

Galveston County Purchasing Department utilizes Bonfire Interactive to distribute and receive bids and proposals in an electronic format via an online portal. Potential Bidders must register through the online portal to participate electronically. "Walk-in" or "mailed-in" (see instructions below) proposal submittals are still allowed, however, **Bidders are strongly encouraged to submit their proposals online via Galveston County's e-Procurement Portal located at <https://galvestoncountytexas.bonfirehub.com/>**

Registration is currently open and free to the public. Once registered, suppliers will receive automatic email notifications of project opportunities based on the NIGP commodity codes selected by the vendor. Potential Bidders should visit the link below and click on the New Vendor Registration tab to register your business:
<https://vendorsupport.gobonfire.com/hc/en-us/articles/15646869029783-Vendor-Registration>

There is no cost to register as a vendor.

INSTRUCTIONS FOR "WALK-IN" SUBMITTALS ONLY

IF "WALKING IN" Submittals, one (1) unbound original proposal, two (2) proposal copies, must be submitted no later than 2:00 PM CST, on Thursday, September 4, 2025:

Veronica Van Horn
Interim Purchasing Agent
County of Galveston
722 Moody Avenue (21st Street), Fifth (5th) Floor
Galveston, TX 77550

The timestamp clock located in the Purchasing Agent's office shall serve as the official time-keeping piece for this solicitation process. Any proposals received after 2:00 PM CST on the specified date will be returned unopened.

Proposal Specifications can be obtained at the office of the Galveston County Purchasing Agent, located in the Galveston County Courthouse, 722 Moody, (21st Street), Floor 5, Purchasing, Galveston, Texas 77550, or by visiting the Galveston County website @ **<https://www.galvestoncountytexas.gov/county-offices/purchasing>**

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

E. PROPOSAL SURETY

A bid bond is not a requirement of this solicitation request.

F. PERFORMANCE AND PAYMENT BONDS

A surety bond in the amount of \$250,000.00 is a requirement of this solicitation

G. BEST AND FINAL OFFERS (BAFO)

The Best and Final Offer process is applicable to this solicitation.

H. DAVIS-BACON WAGE RATES

Davis-Bacon Wage Rates are not requirements for this solicitation.

I. PERSONNEL TO CONTACT

Respondents desiring an explanation or interpretation relative to this solicitation must request it in writing. Oral explanations or instructions will not be binding. Any information given to a Respondent, which in the opinion of the County affects all Respondents or would be prejudicial to other Respondents if not communicated, shall be furnished to all Respondents as an addendum to the solicitation. Respondents **must** direct all inquiries to the following:

Veronica Van Horn
Interim Purchasing Agent
722 21st Street (Moody)
Galveston, Texas 77550
e-mail: purchasing.bids@co.galveston.tx.us

Respondents must e-mail their requests (with the subject line “Galveston County Guardianship Program – RFP #25-057– Questions”) for additional information and/or clarification to the address listed above. The request must include the Responder’s name and the solicitation number and title.

Any request for additional information or clarification must be received in writing no later than ten (10) calendar days prior to the solicitation due date. Late requests or those not delivered to the proper address may not receive a reply. Respondents shall not attempt to contact the County by any other means. The Purchasing Agent shall post the answers on the County website from the procurement web page and via addendum.

The County will issue responses to inquiries and any other corrections or amendments, it deems necessary, in the form of a written addendum, issued prior to the solicitation Submission Deadline / Solicitation Opening date. The County, at its sole discretion, may not issue a response to an RFI submittal. Respondents should not rely on any oral or written representations, statements, or explanations, other than those made in this solicitation or in any written addendum to this solicitation. Where there appears to be conflict between the solicitation and any issued addenda, the last addendum issued will prevail.

Addenda will be posted and made available on the County’s procurement web page. **It is the Responder’s sole responsibility to ensure receipt of all addenda prior to submitting its response.** All Respondents should check the County’s procurement web page for all addenda prior to submitting a response.

The County’s procurement web page is located at <http://www.galvestoncountytexas.gov/county-offices/purchasing>

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

The Respondent must acknowledge the receipt of all addenda on the forms provided. In the event a Responder fails to acknowledge receipt of such addenda, the County may, at its sole discretion, determine that such failure to acknowledge any or all addenda does not materially affect the solicitation and waive the acknowledgment of one or more addenda.

Respondents who submit inquiries *after* the deadline date for receipt of questions indicated on the Procurement Timeline, risk that its response in the procurement will not be responsive or competitive because the County is not able to respond before the solicitation receipt date or insufficient time for the Responder to prepare a responsive or competitive submittal.

All questions and responses as posted on the County website pertaining to this solicitation are considered an addendum to, and part of, this solicitation. Each Responder shall be responsible to monitor the County website for new or revised solicitation information. The County shall not be bound by any verbal information, nor shall it be bound by any written information that is not either contained within the solicitation or formally issued as an addendum by the Purchasing Agent.

J. PROGRAM ADMINISTRATION & CONTRACT MANAGEMENT

The Program Administrator/Contract Manager that will manage the work to be performed under the resultant contract for the purpose of this solicitation is:

Diana Huallpa
Chief Financial Officer
Department of Financial Services
722 Moody, 3rd Floor
Galveston, TX 77550

The Galveston County Commissioners' Court, and/or authorized designees will be responsible for negotiating with the successful Vendor the scope of work, the standards of performance, the specific technology provided, and the support services required for the proposed projects. All contractual amendments will be processed in accordance with Galveston County Purchasing Policies. Amendments will also be brought to Galveston County Commissioners Court for approval as deemed necessary. The approval process serves to ensure the project technology and/or service is within the scope of the resultant contract that pricing meets the agreed-upon pricing methodology as specified in the contract, and that funds are available.

K. REQUIREMENTS OF REQUEST FOR PROPOSAL

Respondent shall provide one (1) original and two (2) hard copies of its response to the Interim Purchasing Agent on or before the submission deadline specified herein. Font size is limited to no smaller than font size 11, except that organizational charts, other graphics, and footers may be as small as font size 9.

L. INSURANCE

Responder must submit, with its response, a current certificate of insurance evidencing coverage in the amounts specified below or greater. In lieu of submitting a certificate of insurance, Respondents may submit a notarized statement from an insurance company authorized to conduct business in the State of Texas guaranteeing that Respondent has such insurance. Provided, however, that successful Respondent(s) shall be required to provide a current certificate of insurance to the Galveston County Purchasing Agent's Office before Respondent commences any work hereunder. **Insurance shall be placed with insurers having an A.M. Best's rating of no less than A.** Such insurance must be issued by a casualty company authorized to do business in the State of Texas and in standard form approved by the

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

Board of Insurance Commissioners of the State of Texas, with coverage provisions ensuring the public from loss or damage that may arise to any person or property by reason of services rendered by Contractor.

Galveston County shall be listed as an additional insured on each policy and all certificates of insurance and Contractor shall provide Galveston County with no less than thirty (30) calendar days prior notice of any changes to the policy during the contractual period.

Certificates of Insurance, fully executed by a licensed representative of the insurance company written or countersigned by an authorized Texas state agency, shall be filed with the County Purchasing Agent within ten (10) calendar days of the execution of this Agreement as written proof of such insurance and further provided that Contractor shall not commence work under this Agreement until Contractor has obtained all insurance required herein, provided written proof as required herein, and received written notice to proceed issued from the County Purchasing Agent. **Failure to provide such evidence of insurance within the ten (10) calendar day period shall constitute an event of default.**

Workers' Compensation Insurance. Respondent shall carry in full force Workers' Compensation Insurance Policy(ies), if there is more than one employee, for all its employees, including but not limited to full-time, part-time, and emergency employees employed by the Contractor.

Commercial General Liability. Respondent shall carry in full force commercial general liability insurance with a limit of not less than \$1,000,000 each occurrence and \$2,000,000 in the aggregate. The Policy shall, minimally, cover liability for bodily injury, personal injury, and property damage.

Business Automobile Liability. Respondent shall carry in full force business automobile liability coverage with a combined bodily injury/property damage limit of not less than \$1,000,000 each accident. The policy shall cover liability arising from the operation of licensed vehicles by policyholder.

Subrogation Waiver. Contractor and Contractor's insurance carrier shall waive any and all rights to subrogation against Galveston County regarding any suit or claim arising out of personal injury or property damage resulting from Contractor's performance under this Agreement.

M. GUARDIANSHIP SERVICES:

Guardianship services include personal and professional services that satisfy the requirements of the Texas Probate Code and common law relating to guardian and ward relations, including concerns of health, education, welfare and fiduciary responsibility. Any legal services required to function as a guardian are the responsibility of the proposer and should be considered in submitting a proposal:

- **Guardian of the Person:** This person is under a statutory duty to care, control and protect a ward and provide the ward with clothing, food, medical care and shelter. Shelter can be in the ward's home, a nursing home, a relative's home, foster or boarding home, hospital or other medical facility. A guardian of the person is required to file an annual report on the condition of well-being of a ward with the Probate Court.
- **Guardian of the Estate:** This person serves a fiduciary and is under a duty to take care of and manage the ward's estate as a prudent person would manage his/her own property. A guardian of and the action taken on the claims; a description of all property, a complete accounting of all receipts and disbursements of the estate and detailed information concerning all cash being administered by the guardian.
- **Estate of the Ward:** Payees of wards take care of the ward's financial obligations and needs. A payee of the person is required to file an annual report on the financial status and well-being of a ward with the Probate Court.

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

The County reserves the right to prohibit any of the service provider's employees and/or independent contractors or subcontractors from performing services with regard to this contract.

All personnel shall be required to pass a background check conducted by the Service Provider for employment. Additionally, all personnel performing on-site services may be required to undergo a urinalysis or blood test if there is reason to believe that they are under the influence of alcohol or other substances of abuse.

N. PROPOSER DELIVERIES

Interested parties are encouraged to present proposals that are based on the unique capabilities and resources of their organization. These proposals should provide responses to the following.

Corporate Experience and History:

Proposer shall provide a brief history of its organization, management structure, mission and an overview of current services.

Included in this section, the service provider shall provide a summary of their current and recent history of past performances related to guardianship services. Please address the following information for each item listed below:

1) Company Profile

- a) Specify the date organized to providing guardianship services. Include a brief history of the organization, management structure, current services provided and any other relevant information pertinent to demonstrating the firm's capability. Include in your discussion:
 - i. Number of employees employed by the company,
 - ii. Annualized dollars of payroll, and
 - iii. Number of years in business
- b) Describe current contracts and include the following information:
 - i. Client name, address, and telephone numbers;
 - ii. Date of original contract and expiration dates;
 - iii. Number of renewals (if applicable);
 - iv. Dollar amount of contracts
- c) List all contracts lost, or not renewed (list contact person and telephone number), in the last three (3) years. Please provide narrative describing reasons that contracts have not been renewed. Service provider must specifically identify any contracts from which they have asked to be relieved or any contracts that have been canceled prematurely.
- d) Discuss any corporate reorganization or restructuring that has occurred within the last three years and discuss how the restructuring will impact upon the firm's ability to provide services proposed. Service provider shall disclose the existence of any related entities (sharing corporate structure or principal officers) doing business in the field of guardianship services.
- e) Describe other current or anticipated contractual obligations that have been awarded which will coincide with the terms of this contract.
- f) Describe experience with similar size County contracts and highlight evidence of achievements in this area.

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

- g) Provide an organizational chart delineating corporate office organizational structure.

The service provider is cautioned that it is the service providers sole responsibility to submit information related to the evaluation categories and that the County of Galveston is under no obligation to solicit such information if it is not included with the service providers proposal. Failure of the service provider to submit such information may cause an adverse impact on the evaluation of the service provider's proposal.

The County of Galveston reserves the right to consider historic information and fact gained from the service provider's proposal, oral presentation, references or other objective data, in the evaluation process.

Methodology:

Proposer will describe its plan to provide guardianship services to the person, payee of the person, and/or guardian of the estate of Galveston County clients and provide guardianship services from the first allegation of incapacity through the termination of the guardianship.

Staffing:

Proposer shall specify if and how they intend to integrate current employees, if applicable, and subcontractors into their program.

Proposer will describe how it will transition current wards to proposer's supervision if applicable. Proposer will describe any personal and/or professional service subcontracts it has or anticipated for the care of Galveston County clients.

Proposer will demonstrate some evidence of its ability to employ or contract with qualified supervision and staff.

Proposer will provide a copy of written policies and procedures relevant to its performance under this agreement as part of this proposal to include its policies regarding criminal background checks on all of its employees who come into contact with clients and their property.

Financial:

Proposers must obtain a surety bond in the amount of \$250,000 and provide annual verification to the Probate Court from the bond provider that the bond premium is up to date.

Proposer will provide evidence of its ability to monitor the client's financial status. Although most clients will have very little personal wealth, some may have moderate assets or benefits which must be carefully invested, expended, or otherwise protected from abuse. A program must have a system and policies and procedures in place to maintain and safeguard individual client accounts. The system must include mechanisms for the disbursement of monthly or weekly payments to creditors or "allowance" payments to the client.

Proposer will describe or present a sample of documents it will provide the County Auditor and the County Probate Court that recaps specific services rendered on a monthly basis along with an expense report detailing all client expenditures for guardianship cases being maintained by the Proposer under the County contract as well as any resources available to support these services from non-county funds.

Proposer will indicate how it will segregate and account for County funds separate from other agency funds in either a separate number bank account or in a general operating account, either of which must be supported with the maintenance of a separate accounting fund or a general fund with a separate chart of accounts that reflects revenues

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

and expenditures for the monies received under the contract. Proposer will specify how it will classify or prorate its indirect costs to any other cost centers including a guardianship cost center.

Proposer will provide the County verification of its Internal Revenue Service taxpayer identification number and certificate that is in compliance with applicable Internal revenue code, rules and regulations along with a proof of good standing with the Texas Comptroller of Public Accounts as an exhibit to this proposal.

Proposer must be willing to bill Medicaid for guardianship services provided to wards under separate contracts the Proposer has with organizations such as Adult Protective Services (APS), Texas Department of Aging and disability.

Services, or GULF COAST Mental Health and Mental Retardation Center. Such services must be reimbursed under those contracts.

Proposer must adhere to generally accepted accounting principles. An annual audit of accounts and procedures will be performed and a copy filed with the Auditor's Office within 90 days of the close of the fiscal year.

Proposer must maintain an accurate and complete client record. Records must be kept confidential. Provisions must be made for the safe storage of client records or accurate and legible reproductions for a minimum of five years following termination of the guardian court order.

Proposer will refund to the County any money which has been paid to the Proposer by the County, which County determines has resulted in overpayment to Proposer, or which County determines, as a result of periodic program evaluation or financial audits, has not been spent by the Proposer strictly in accordance with the terms of the contract. The proposer shall make such refund to the County within 30 days after the County requests refund.

Proposer will provide the county with a copy of the last two (2) years of financial statements. Successful Proposer shall provide the County with a copy of each current year financial statements prior to the renewal of that year's contract.

Pricing:

Proposer will provide a unit cost to serve 75 existing wards and a unit price for up to an additional 125 wards. Proposers must be prepared to render face-to-face contact with a ward as needed to properly care for the ward at a minimum of once per month.

Litigation History and Experience:

Provide a list of all litigation the service provider has been or is currently involved in during the last three years. Including a narrative describing all cases that were settled and amounts of settlement.

O. ADDITIONAL REQUIREMENTS

Proposer must be prepared to meet the following additional requirements.

Galveston County will use the National Guardianship Association's Standards of Practice and Model Code of Ethics for Guardians as its guide in ensuring appropriate guardianship services and the ethical standards expected of any guardian serving under this agreement.

Proposer agrees to meet all guidelines and requirements of the Texas Probate Code and common law relating to guardian and ward relations.

SPECIAL PROVISIONS

REQUEST FOR PROPOSAL GALVESTON COUNTY GUARDIANSHIP PROGRAM GALVESTON COUNTY, TEXAS

Proposer will provide all services and activities performed under the terms of the contract in compliance with the Civil Rights Act of 1964, as amended, the Rehabilitation Act of 1973, Public Law 93-112, section 504, and with the Provisions of the American with Disabilities Act of 1990, Public law 101-336[S.933] ("ADA").

Proposer will not discriminate against any employee, applicant for employment, or eligible client based on race, religion, color, sex, national origin, age or handicapped condition.

Proposer will assume all of the rights, obligations and liabilities applicable to an independent contractor.

PROPOSAL REPARATION AND SUBMISSION REQUIREMENTS:

RFP Response: In order to be considered for selection, the Proposer must submit a complete response to the RFP. One (1) original and two (2) copies of each proposal must be submitted to Galveston County by the due date. The Proposer shall make no other distribution of the proposal.

Proposal Preparation: An authorized representative of the Proposer shall sign the proposal. All information requested must be submitted. Failure to submit all information requested may result in the rejection of the proposal. If more than one alternate is proposed within the proposal, the entire proposal will be rejected for lack of specificity.

- 1) Proposals should be typed/printed on "8 ½ x 11" paper, with at least one-inch margins, using 12-point type. Proposals are limited to a maximum of 25 pages including all forms and attachments. All pages of the proposal should be numbered. Any pages over 25 may be discarded or result in substantially lower evaluation of the proposal.
- 2) Proposals should be organized in the order in which the requirements are requested in the Proposer Deliverables Section pages 6-9 of this RFP. Each paragraph/section should reference the corresponding section of the RFP and repeat the title as it appears in this document. Information the Proposer desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at end of the proposal and designated as additional materials.
- 3) Each copy of the proposal must be contained in a single bound notebook and divided into marked sections.

Oral Presentation: Proposers who submit a proposal in response to the RFP may be required to give an oral presentation of their proposal to the evaluation committee. This provides an opportunity for the Proposal to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiations.

P. INVOICES:

Invoices must be itemized indicating all materials and supplies used. Invoices must be submitted to:

**Galveston County Auditor's Office
Attn: Accounts Payable
P.O. Box 1418
Galveston, Texas 77553**

Failure to submit invoices to the above address or failure to include the Purchase Order Number will result in delay in payment.

SPECIAL PROVISIONS
REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS

Contractor must accept purchase order numbers for specified supplies, equipment, and/or services. Contractor shall not perform any work or release any supplies and/or equipment to any authorized representative of the County of Galveston unless a valid purchase order number issued by the office of the Galveston County Purchasing Agent accompanies the order or if vendor can comply with the provision as stated in the General Provisions, page 8, item 13, Procurement Card Program.

Payment for any items issued without prior receipt of a valid purchase order number may become the sole responsibility of the successful contractor.

Q. EVALUATION AND SELECTION PROCESS

The Evaluation Committee will consider the most cost productive, efficient, and effective proposal. While the County of Galveston appreciates a brief straight forward and concise response, the proposer must fully understand that the evaluation is based on the information provided. Accuracy and completeness are essential omissions, ambiguous, or equivocal statements may be construed against the proposer. Proposal responses may be incorporated into any contract that results from this RFP, and proposers are cautioned not to make claims or statements that they are not prepared to commit to contractually. Failure of the proposer to meet such claims will result in requirements that the proposer provides the resources necessary to meet the submitted claims.

The award(s) will be made to the responsible proposer(s) whose proposal is determined to be the best evaluated offer demonstrating the best ability to fulfill the requirements set forth in this Request for Proposal. The requested services will be awarded primarily based on the evaluation criteria listed below as well as complying with the provisions as stated on page 10 of the General Provisions, Item 18, Award of Proposals – Evaluation Criteria and Factors.

Evaluation Criteria: Proposals shall be evaluated by the Evaluation Committee using the criteria listed below. Subheadings under each criteria indicates the type of factors to be considered but are not necessarily exclusive. Evaluations will be made, and points awarded based solely on the information contained in the proposal.

<u>Criteria</u>	<u>Points</u>
• Corporate Experience & History	15 Points
• Methodology for Providing Services	25 Points
• Staffing	20 Points
• Financial capacity	15 Points
• Financial Accountability, reporting and record keeping	15 Points
• Pricing	10 Points

R. SAMPLE AGREEMENT

All proposers are required to include a Sample Agreement with their proposal submittal. The sample agreement will be reviewed by Galveston County's legal counsel and the terms will be negotiated with the successful proposer.

S. DISASTER AND EMERGENCY RESPONSE

The Galveston County Commissioner's Court recognizes the vulnerability of Galveston County citizens and their communities to damage, injury, and loss of life and property resulting from disasters. Such events require 24/7 responses from emergency first responders, government employees, various elected and appointed officials, state and local representatives, and other emergency management personnel.

To satisfy cost reasonableness responsibilities and reimbursement initiatives in times of declared emergencies or disasters and their recovery efforts, the County of Galveston reserves the right to obtain additional quotes and current pricing information from the successful contractor and other contractors to perform the work as stated per the

SPECIAL PROVISIONS

**REQUEST FOR PROPOSAL
GALVESTON COUNTY GUARDIANSHIP PROGRAM
GALVESTON COUNTY, TEXAS**

specifications listed herein and in the resultant contract. These services shall be solicited on the open market with the same specifications as listed herein and as stated in the resultant contract, however, may include scope changes due to the unknown status of the emergency.

The County of Galveston reserves the right to utilize the most advantageous and cost-effective solution(s) during the duration of the declared event and recovery period in an effort to relieve the taxpaying citizens of increased burden and financial hardship.

The remainder of this page intentionally left blank

SPECIAL PROVISIONS

REQUEST FOR PROPOSAL GALVESTON COUNTY GUARDIANSHIP PROGRAM GALVESTON COUNTY, TEXAS

T. REQUIRED DOCUMENTS CHECKLIST

By signing here, the firm does hereby attest that it has fully read the instructions, conditions, and general and special provisions and understands them. **Proposer shall return this checklist with completed submittal.**

THE COMPANY OF: _____

ADDRESS: _____

FEIN (TAX ID): _____

The following documents shall be returned or confirmed with an "X" with solicitation submittals. Failure to do so may be ample cause for rejection of qualification submittal as non-responsive. It is the responsibility of the Proposer to ensure that Respondent has received all addenda.

Items:

Confirmed (X):

- | | |
|--|-------------------------------------|
| 1. Required Documents Checklist (this page) | _____ |
| 2. Addenda Acknowledgement (if any) | #1 _____ #2 _____ #3 _____ #4 _____ |
| 3. "Walked In" Submittals: One (1) original, two (2) copies of submittal; Bonfire: One (1) submittal | _____ |
| 4. ATTACHMENT A - Vendor Qualification Packet | _____ |
| 5. ATTACHMENT B - Certification Reg. Debarment, Suspension, and Other Ineligibility | _____ |
| 6. ATTACHMENT C - Certification Regarding Lobbying Form | _____ |
| 7. ATTACHMENT D - Non-Collusion Affidavit | _____ |
| 8. ATTACHMENT E - Prohibition on Contracts with Companies Boycotting Israel | _____ |
| 9. ATTACHMENT F - Prohibition on Contracts with Certain Companies | _____ |
| 8. ATTACHMENT G - Information for Notice | _____ |
| 10. ATTACHMENT H - References | _____ |
| 11. Bid Proposal | _____ |

Person to contact regarding this qualification: _____

Title: _____ Phone: _____ Fax: _____

E-mail address: _____

Name of person authorized to bind the Firm: _____

Signature: _____ Date: _____

Title: _____ Phone: _____ Fax: _____

E-mail address: _____