

COUNTY OF KERN

**KERN BEHAVIORAL HEALTH &
RECOVERY SERVICES**

**REQUEST FOR QUALIFICATIONS
TO DEVELOP A
CONTRACT LIFE MANAGEMENT SYSTEM**

DUE: January 5, 2025

TIME: Before 11:00 a.m.

COUNTY OF KERN

KERN BEHAVIORAL HEALTH & RECOVERY SERVICES

Request for Qualifications (RFQ) to Develop A Contract Life Management System

The County of Kern, through Behavioral Health and Recovery Services (BHRS), is seeking a qualified contractor to develop a Contract Life Management system for the Contracts Unit. The selected contractor will be responsible for developing a comprehensive, user-friendly, and scalable CLM system that will streamline the end-to-end contract management process — including contract creation, review, approval, execution, monitoring, renewal, and archival. The system should enhance transparency, ensure compliance with regulatory and internal policies, improve workflow efficiency, and provide robust reporting and audit capabilities to support data-driven decision-making.

The procurement process will be conducted in two phases:

- ❖ Phase I: Will involve screening potential contractors to determine if they meet the minimum qualifications to develop the department’s contract life management system.
- ❖ Phase II: Will consist of contractor presentations to further evaluate their capabilities and approach.

Only those potential contractors who fully satisfy the requirements in Phase I will be invited to advance to Phase II of the selection process.

Potential contractors are specifically directed not to contact any County personnel, other than the Contact Person indicated below, for any purpose related to this RFQ. Unauthorized contact of any County personnel may be cause for rejection of a vendor’s proposal. All inquiries concerning this RFQ should be directed to the following Contact Person:

Kern Behavioral Health & Recovery Services
2001 – 28th Street
Bakersfield, CA 93301
jscales@kernbhhrs.org

Envelopes containing the Request For Qualifications are to be marked:

Request For Qualifications To Develop A Contract Life Management System

The following dates are set forth for information and planning purposes only. These dates may be changed by County upon notice to prospective proposers:

Issuance Date November 24, 2025
Proposal Due Date January 5, 2026
Proposal Due Time Before 11:00 a.m.

Postmark date will not constitute timely delivery. Responses received after the above time will not be considered. Proposers are solely responsible for ensuring timely receipt of their Proposals. If hand delivery is planned to our offices, please be aware that delays through building security protocol should be planned for by the proposer since timely receipt of all Proposals is required.

TABLE OF CONTENTS

	PAGE NUMBER
I. GENERAL INFORMATION	
A. Project Background	4
B. Primary Role Of The Qualified Contractor	4
C. Vendor Eligibility Requirements	5
D. General Contract Information	6
E. Required Documents	6
F. Minimum Qualifications	6
G. Services Provided By BHRS	7
H. Selection Process	7
I. Additional Selection Information	8
J. Local Vendor Preferences	8
K. Proposal Accuracy and Format Compliance	9
L. Solicitation Caveats	9
M. Statutes and Rules	10
N. Background Review	10
II. PROPOSAL INFORMATION AND REQUIREMENTS	
A. General Instructions	10
B. Business Address	10
C. Proposal Format	10
D. Proposal Contents	11
❖ Exhibit A: Contract & Contract Monitoring Processing Cycle	13
❖ Exhibit B: Scope Of Work – Contract Life Cycle Management (CLM) System Services	15
E. Questions From Potential Contractors	20
F. Proposal Submission	20
G. Withdrawal and Submission of Modified Required Documentation	20
KERN COUNTY ADMINISTRATIVE BULLETIN	
Appendix I- Free Speech Policy	21

I. GENERAL INFORMATION

A. Project Background

Kern County spans 8,161 square miles in the San Joaquin Valley of California. The County is divided into eleven (11) Geographic Service Areas for serving individuals who need mental health care. The Behavioral Health and Recovery Services (BHRS) administration office is located in Bakersfield, the county seat, in the southern region of the San Joaquin Valley.

BHRS is the Mental Health Plan for specialty mental health services and the Drug Medi-Cal Organized Delivery System in Kern County and has been providing specialty mental health services and SUD treatment for more than thirty (30) years. The Department operates under the directorship of Ms. Alison Burrowes, MA, LCSW and is governed by the five (5) members of the Kern County Board of Supervisors (BOS). The Department strives to promote its mission statement, "Working together to achieve hope, healing, and a meaningful life in the community".

The Department's goal is to ensure the citizens of Kern County who are afflicted with mental and behavioral health disorders are provided with services and resources necessary for their treatment and recovery. The Department utilizes the services of contracted providers for mental and behavioral health treatment services for adults and minors in most geographic areas throughout Kern County.

The Contracts Unit operates under the Clinical Plan Services Division of Behavioral Health and Recovery Services. The Clinical Plan Services Division is responsible for overseeing the coordination, authorization, and quality assurance of behavioral health services delivered through managed care partnerships. This division ensures that services are clinically appropriate, compliant with state and federal regulations, and aligned with the Department's mission to provide accessible, effective, and person-centered care to Medi-Cal beneficiaries and uninsured individuals in Kern County.

The Contracts Unit supports the mission of the organization by ensuring the timely, compliant, and efficient development, execution, and monitoring of contracts that enable the delivery of high-quality behavioral health services. Through strong governance, risk mitigation, and collaboration with internal and external stakeholders, the unit helps secure the resources and partnerships necessary to meet the needs of the community and uphold the organization's commitment to accessible, person-centered care.

This Request for Qualifications (RFQ) seeks a qualified contractor to design and implement a comprehensive Contract Lifecycle Management (CLM) system. The contract management phase is critical to ensuring that agreements are executed effectively and remain in compliance with all terms and conditions. A well-structured CLM system reduces organizational risk, enhances operational efficiency, and strengthens collaboration and accountability among all involved parties.

B. Primary Role Of The Qualified Contractor

The primary role of the potential qualified contractor will be to develop a Contract Life Management System that addresses the following aspects of contract management:

Procurement

- ❖ Alert BHRS when a requests for proposals (RFPs) is needed.
- ❖ Alert BHRS when a requests for proposals (RFPs) is due.

Contract Creation

- ❖ Auto draft an agreement based on terms negotiated between parties.
- ❖ Develop and maintain contract templates.

Negotiation and Approval

- ❖ Obtain electronic approval from parties.
- ❖ The ability to route draft agreements to vendors for review
- ❖ -Allow vendors to redline and provide feedback comments.

Execution

- ❖ Obtain electronic signatures from parties.
- ❖ Distribute electronic copies to all parties involved.

Performance and Monitoring

- ❖ Track performance and ensure compliance with terms.

Renewal or Amendment

- ❖ If the contract has an expiration date, evaluate the need for renewal.

Termination or Close-Out

- ❖ Terminate the contract upon completion or expiration.
- ❖ Archive contracts.

Potential contractors will be expected to review Exhibit A, Contract & Contract Monitoring Processing Cycle and Exhibit B, Scope Of Work: Contract Life Management System (CLMS) Services to understand the expected outcome, what the desired goals and objectives are, and what specific problems and challenges need to be solved in order to achieve the required end result.

C. Vendor Eligibility Requirements

To ensure accountability, service quality, and direct vendor support, BHRS requires that all proposals be submitted exclusively by vendors who are the original developers and/or direct providers of the proposed Contract Lifecycle Management System (CLMS). The following conditions apply:

- 1. Ineligible Parties:** Third-party resellers, brokers, or implementation partners who do not own and directly support the software are not eligible to submit proposals.
- 2. Ownership and Responsibility:** The proposing vendor must have full ownership or exclusive licensing rights to the software and be solely responsible for all aspects of implementation, training, support, and maintenance.
- 3. Verification:** BHRS reserves the right to request documentation verifying the vendor's direct relationship to the software product and its development team.

D. General Contract Information

Contract Start Date	April 6, 2026
Negotiation Process	One Agreement will be negotiated between BHRS and the prospective service provider and approved by the Kern County Board Of Supervisors prior to service delivery
Pre Project Initiation	<ul style="list-style-type: none">❖ Develop A Needs Assessment❖ Discuss The Integration Of BHRS ITS Staff Onto The Project team.❖ Develop And Launch A Pilot Contract Life Management System.
Compensation	Compensation shall be agreed upon by BHRS and Vendor to be included in the final agreement for services.

E. Required Documents

Additionally, the potential contractor will be required to comply with the following prior to proceeding with performing the provisions of the contract:

1. Disclosure of Ownership: provide disclosures of ownership and control. A Disclosure of Ownership form will be provided to the successful contractor by KernBHRS once a contract is awarded.

2. Screening for Ineligible and Suspended Employees and Entities (Exclusions): evidence that the contractor is not identified on the List of Excluded Individuals/Entities (LEIE), the General Services Administration Excluded Parties List System (SAM-EPLS), the DHCS Medi-Cal List of Suspended of Ineligible Providers nor the Social Security Administration's Death Master File (SSA DMF), and that the contractor will not employ individuals or contract with individuals or vendors that are excluded from participation in Federal health care programs. Additionally, KernBHRS has a process in place to verify the accuracy of new and current (prior to contracting with and periodically) providers and contractors in the National Plan and Provider Enumeration System (NPPES).

3. Pre-Award Risk Assessment: this form is an evaluation of the proposer's history, performance, financial status, and the management systems of the organization. This tool allows KernBHRS to determine if adequate systems are in place to appropriately account for allowable and unallowable costs, documentation of expenditures, allocation of costs, cash management, and internal controls.

4. W-9: a completed W-9 form identifying the business entity, federal tax classification and tax identification number (either SSN or EIN).

5. Corporate Compliance: evidence of a comprehensive Corporate Compliance Program that includes auditing, monitoring, and reporting methods designed to guard against fraud, waste, and abuse.

6. Credentialing, Exclusion Reporting and Corporate Compliance Form (CECC): a form to be completed by the successful contractor regarding credentialing, exclusion reporting and corporate compliance program.

7. Insurance Certificate: evidence of insurance as required by the County of Kern that includes all necessary endorsement forms and language to perform the provisions of the contract.

F. Minimum Qualifications

Behavioral Health and Recovery Services (BHRS) has established a set of minimum qualifications that must be met by all potential contractors in order to be considered for an invitation to Phase II of the procurement process. These minimum qualifications are described in Section Two, Proposal

Information and Requirements, Paragraph 3 - Phase I Of The Evaluation Process and Paragraph 4-Phase I Evaluation Process Directions pages 11 - 12.

All potential contractors are expected to thoroughly review the Minimum Qualifications on pages 11 - 12 to understand each criterion and ensure they submit the required supporting documentation. This documentation is essential to demonstrate the contractor's eligibility and capacity to perform the requested services.

Failure to provide the required documentation will result in disqualification from advancing to Phase II of the evaluation process. Only those potential contractors who meet all minimum qualifications and submit complete documentation will be invited to participate in the next phase.

G. Services Provided By BHRS

BHRS will provide a Contact Person as a primary contact, who will arrange for staff assistance by other County staff as may be required. Contact person is for this solicitation is: Jewelle Scales at jcales@kernbhrs.org.

H. Selection Process

BHRS is seeking qualified potential contractors to develop a Contract Life Management (CLM) System for the Contracts Team. The selected contractor will be responsible for developing CLM system that will streamline the end-to-end contract management process

The selection process will be conducted in two phases:

Phase I – Minimum Qualifications Screening:

- ❖ During this phase, potential contractors will be evaluated to determine whether they meet the minimum qualifications to perform the requested services. Potential contractors must clearly demonstrate their knowledge and relevant experience in order to advance to Phase II.
- ❖ All potential contractors who submit the required documentation by the specified deadline will be reviewed by an Evaluation Committee. Submissions will be scored based on the established evaluation criteria.
- ❖ Potential contractors who receive a score of 80 points or higher will be selected to advance to Phase II of the evaluation process.
- ❖ Selected potential contractors will be notified in writing by Jewelle Scales regarding their invitation to participate in Phase II.

Phase II – Contractor Presentations:

- ❖ Potential contractors who meet the minimum qualifications in Phase I will be invited to participate in Phase II, which will consist of formal presentations. This phase will further assess each contractor's approach, capacity, and overall suitability to deliver the required services.
- ❖ Only those potential contractors who successfully demonstrate their qualifications and capabilities in Phase I will receive an invitation to proceed to Phase II of the selection process.
- ❖ This solicitation is intended to select a single qualified contractor to develop Contract Life Management (CLM) System.

I. Additional Selection Information

Behavioral Health and Recovery Services (BHRS) reserves the right to select the potential contractors who, in its sole judgment, best meet the needs of the Department to participate in Phase II of the evaluation process.

All contractors who respond to this solicitation will be notified in writing of their selection or non-selection for Phase II.

Selected proposers will receive written notification from the designated BHRS representative, Jewelle Scales, including the date and details of the Department's recommendation to proceed to Phase II of the selection process.

County employees will not participate in the selection process when those employees have a relationship with a person or business entity submitting a Proposal which would subject those employees to the prohibition of Section 87100 of the Government Code. Any person or business entity submitting a Proposal who has such a relationship with a County employee who may be involved in the selection process shall advise the County of the name of the County employee in the Proposal.

Any person or business entity which engages in practices which might result in unlawful activity relating to the selection process including, but not limited to, kickbacks or other unlawful consideration paid to County employees, will be disqualified from the selection process.

J. Local Vendor Preferences

If one or more of the proposers is a local vendor as defined herein, said proposer(s) shall be entitled to a local vendor preference as herein described, provided: (i) said proposer(s) achieved a score of at least seventy percent (70%) during the initial scoring phase by the Evaluation Committee; and (ii) they were included in the short list of proposers for further consideration by the Evaluation Committee, if the Evaluation Committee elected to create a short list of Proposals.

All local vendors meeting the above stated criteria shall have their final evaluation score increased by five percent (5%) for purposes of determining the Evaluation Committee's final selection for recommendation to the Board of Supervisors.

A local vendor is defined as a proposer who:

(a) Has had a fixed office or distribution point located in and having a street address within the county for at least six (6) months immediately prior to the issuance of the request for competitive bids by the purchasing agent

(b) Holds any required business license by the county or a city within the county; and

(c) Employs at least one (1) full-time or two (2) part-time employees whose primary residence is located within Kern County, or if the business has no employees shall be at least fifty percent (50%) owned by one or more persons whose primary residence is located within Kern County.

All local vendors with a Local Employee Ratio of 50% or higher will receive an additional 2% score increase, and those with a ratio of 100% will receive a 3% increase to their score. (Rev 11/19)

(d) Will credit all sales taxes generated pursuant to the contract awarded as a result of the application of this local vendor preference to its business location in Kern County.

This local vendor preference shall not apply to any contracts funded in whole or in part with federal or state funds which do not allow the use of local preferences, or any other contracts which are statutorily or otherwise precluded from the use of local preferences during the selection process.

At-Risk Employer Preference

Per County Ordinance 2.38.132, the At-Risk Employer preference will be implemented. This ordinance provides a preference to local vendors who are also at-risk employers. If there is a tie for the low bid and both bidders are local vendors but one of the bidders is also an at-risk employer, the contract shall be awarded to the low bidder that is also the at-risk employer. In the event local vendors are allowed to submit a new bid equal to or less than the out of county low bidder, and there is a tie for the low bid and one of the responsible low bidders is also an at-risk employer, the local vendor who is also an at-risk employer will be awarded the contract

To qualify as an "At-Risk Employer," Vendor shall state below that you have provided gainful employment to "at-risk" individuals residing in Kern County for at least one (1) year prior to submitting this bid; and you continue to provide gainful employment to 'at-risk individuals. "At-Risk Individuals" are defined in County Ordinance 2.38.132 as those individuals who have been incarcerated within the last five (5) years and/or have been convicted of a misdemeanor or felony within the last five (5) years and/or are youth in foster care.

Vendor has employed at least one (1) at-risk individual residing in the County of Kern for at least one year prior to submitting a bid for this project and continues to provide gainful employment to at-risk individuals residing in the County of Kern.

K. Proposal Accuracy and Format Compliance

Proposals containing errors may be subject to rejection at the discretion of BHRS. In evaluating submissions, BHRS will assess whether the documentation provided by the potential contractor conforms to the required format and content as outlined in this solicitation.

L. Solicitation Caveats

The issuance of this solicitation does not constitute an award commitment on the part of BHRS, and BHRS shall not pay for costs incurred in the preparation or submission of Proposals. BHRS reserves the right to reject any or all Proposals or portions thereof if BHRS determines that it is in the best interest of BHRS to do so.

Failure to furnish all information requested or to follow the format requested herein, or the submission of false information, may disqualify the potential contractor, in the sole discretion of BHRS. BHRS may waive **any** deviation in a Proposal. BHRS's waiver of a deviation shall in no way modify the solicitation requirements nor excuse the successful potential contractor from full compliance with any resultant agreement requirements or obligations.

Potential contractors shall have no rights whatsoever regarding the processes and procedures used by BHRS relating to this solicitation or the manner in which a potential contractor is selected by the Evaluation Committee, provided their decisions are not arbitrary and capricious, and there is some reasonable basis for the selection(s) made.

M. Statutes and Rules

The terms and conditions of this RFQ, and the resulting consulting services and activities performed by the potential contractor, shall conform to all applicable statutes, rules and regulations of the federal government, the State of California and the County of Kern.

N. Background Review

The County reserves the right to conduct a background inquiry of each proposer that may include collection of appropriate criminal history information, contractual and business associations and practices, employment histories, reputation in the business community and financial condition. By submitting the required documentation to the County, the potential contractor consents to such an inquiry and agrees to make available to the County such books and records the County deems necessary to conduct the review.

II. PROPOSAL INFORMATION AND REQUIREMENTS

A. General Instructions

To receive consideration, submission of required documents shall be made in accordance with the following general instructions:

1. The complete submission of required documents shall be without alterations or erasures. Errors may be crossed out and corrections printed in ink or typed adjacent and must be initialed in ink by an authorized representative of the proposer.
2. No oral, telephonic, telegraphic, e-mailed, or faxed submission of required documents will be considered.
3. The submission of the required documents shall be an indication that the potential contractor has investigated and satisfied him/herself as to the selection process to be used by the County, the conditions to be encountered, the character, quality, and scope of the work to be performed, and the requirements of the County.

B. Business Address

Potential contractors shall furnish their business street address. Any communications directed either to the address so given, or to the address listed on the sealed Proposal container and deposited in the U.S. Postal Service by Certified Mail, shall constitute a legal service thereof upon the proposer.

C. Proposal Format

1. Provide all required documentation for each minimum qualification criterion.
2. Please do not submit canned or generic documentation. (A "canned" submission is one that is being repurposed from a previous solicitation. Submission should be specifically written for this solicitation.)

D. Proposal Contents

For ease of review and to facilitate evaluation, the solicitation for this project must be organized and presented in the order requested as follows **(no exceptions)**:

1. Cover Page: Clearly indicate the project title and the name of the firm on the cover page. For example:

Request For Qualifications To
Develop A Contract Life Management System
Submitted By: Organization X
James Smith, Chief Operating Officer

2. Introduction (1 Page)

Include a letter of introduction about your organization signed by an authorized representative of the firm. In your introductory statement please include the following language at the end of your introductory statement:

“The undersigned certifies that all statements in the Proposal are true and correct; and that any material false statement contained in this proposal shall entitle Kern County to pursue any and all remedies authorized by law and/or declare any contract made as a result thereof, to be void.”

Please include an **email address** that we may use to contact your organization.

3. Phase I Of The Evaluation Process

As part of the Phase I evaluation process, potential contractors will be required to conduct an analysis of the Contracts Team’s current end-to-end contracting and contract monitoring process cycle. This exercise is designed to assess each potential contractor’s ability to:

- ❖ Comprehend our existing workflow and operational environment
- ❖ Identify inefficiencies, redundancies, or risks
- ❖ Propose thoughtful, actionable improvements that add value to our organization

The quality and depth of this assessment will be a key factor in the overall evaluation of each proposal.

4. Phase I Evaluation Process Directions

Please review Exhibit A: Contract & Contract Monitoring Process Cycle which outlines our current workflow on pages 13-14 and Exhibit B: Scope Of Work, Contract Lifecycle Management Systems (CLM) System Services which outlines the expectations, deliverables, and performance standards for the design on pages 15-19 and submit a written response that addresses the following prompts:

Process Understanding

- ❖ Summarize your understanding of our current contracting and monitoring process.

Process Inefficiencies and Risks

- ❖ Identify any inefficiencies, redundancies, or risks you observe in the current process.

Improvement Recommendations

- ❖ Propose specific, actionable improvements to enhance the process. Include both short-term and long-term suggestions where applicable.

Tools and Methodologies

- ❖ Describe any tools, templates, or methodologies you would use to evaluate and redesign the process.

Implementation Approach

- ❖ Outline how you would collaborate with our team to implement the proposed redesign, including change management considerations.

Revised Process Flow

- ❖ Include a revised version of the Contract & Contract Monitoring Process Cycle that reflects your proposed improvements.

5. Phase I Contractor Response Template

Potential contractors are to organize their responses to the prompts as follows:

Contractor's Name

Contractor's Address

Contact Person

Contact Person Email Address

Submission Date

Prompt No. 1: Process Understanding

Summarize your understanding of our current contracting and monitoring process.

Prompt No. 2: Process Inefficiencies and Risks

Identify any inefficiencies, redundancies, or risks you observe in the current process.

Prompt No. 3: Improvement Recommendations

Propose specific, actionable improvements to enhance the process. Include both short-term and long-term suggestions where applicable.

Prompt No. 4: Tools and Methodologies

Describe any tools, templates, or methodologies you would use to evaluate and redesign the process.

Prompt No. 5: Implementation Approach

Outline how you would collaborate with our team to implement the proposed redesign, including change management considerations.

Prompt No. 6: Revised Process Flow

Include a revised version of the Contract & Contract Monitoring Process Cycle that reflects your proposed improvements.

**Exhibit A
Contract & Contract Monitoring Processing Cycle**

Step No.	Contract Task	Internal Or External Process	Manual Or Electronic Process	Contract Monitoring Task to Be Completed	Timeframes	Overall Timeframe
1	The System Of Care (SOC) Requests A Contract Through the Portal Contracts Team Receives A Request For Contract At ContractRequest@kernbhrs.org	Internal: The Process Takes Place Within BHRS Via Outlook.	Outlook	None	1 Business Day	Timeframe Begins
	Screening Of The Contract Request ❖ Contract System Supervisor or Contract Administrator Will screen the contract request to ensure that it is an Appropriate Request For The Team To Process ❖ Contract System Supervisor or Contract Administrator Will Screen All Contracts Written By Outside Vendors, Minus State and JPA Contracts ❖ If A Procurement Action Is Needed, The Contract System Supervisor or Contract Administrator Will Take The Lead In Completing The Action	Internal: The Process Is Completed Manually Using Microsoft Word	Manual	None	1 Business Day	
2	Contracts Team Sends The Request For Contract Form (RFC) To The SOC	Internal: The Process Takes Place Within BHRS Via Outlook.	Outlook	None	2 Business Days	
3	SOC Returns the RFC To The Contracts Team	Internal: The Process Takes Place Within BHRS Via Outlook.	Outlook	None	7 Business Days	
4	Contracts Team Drafts The Contract & Board Letter	Internal: The Process Is Completed Manually Using Microsoft Word	Manual	None	7 Business Days	
5	Contracts Team Proofs The Contract & Board Letter	Internal: The Process Is Completed Manually Using A Checklist	Manual	None	Included In The 7 Business days	
6	Contracts Team Sends The Contract To The SOC & Contract Monitoring Unit	Internal: The Process Takes Place Within BHRS Via Outlook.	Outlook	None	1 Business Day	
7	SOC & Contract Monitoring Unit Review The Contract And Return The Draft To The Contracts Team	Internal: The Process Takes Place Within BHRS Via Outlook.	Manual & Returns The Contract Via Outlook	Contract Monitoring To Review for Language & Required Documents	5 Business Days Contract Monitoring & SOC have 5 business day(s) to review and approve the draft	
8	After The Review By The SOC & Contracts Monitoring Unit The Contracts Team Sends The Draft To the Vendor & SOC	Internal: The Process Takes Place Within BHRS Via Outlook.	Outlook	None	1 Business Day	

**Exhibit A
Contract & Contract Monitoring Processing Cycle
(Continued)**

Step No.	Contract Task	Internal Or External Process	Manual Or Electronic Process	Contract Monitoring Task to Be Completed	Timeframes	Overall Timeframe
9	Vendor & SOC Review & Approve The Contract	Internal SOC - The Review Takes Place Within BHRS External Vendor - The Review Takes Place At The Vendor's Place Of Business	Manual	None	15 Business Days	
10	Vendor & SOC Sends The Approved Contract To The Contracts Team	Both The SOC & Vendor Return The Contract Via Outlook To The Contracts Team	Outlook	None	1 Business Day	
11	Contracts Team Sends The Approved Contract By SOC & Vendor To County Counsel (CC)	Internal: The Process Takes Place Within BHRS Via Outlook.	Outlook	None	1 Business Day	
12	County Counsel Review <i>Note:</i> Per County Policy, CC has 10 business days to review and approve.	External The Review Takes Place At The Office Of County Counsel	Manual	None	10 Business Days	
13	After CC Approves & Sends The Contract Back To The Contracts Team, The Contract Team Places The Contract Into DocuSign ❖ Final Proof of the Contract Draft For DocuSign ❖ Final Proof of the Board Letter To Send To CAO	Internal: Takes Place Within BHRS	DocuSign	None	5 Business Days	
14	Contracts Team Sends The Contract & Board Letter To CAO For Approval	Internal: Takes Place Within BHRS	Outlook	None	1 Business Day	
15	County Administrative Office Review <i>Note:</i> Per County Policy, CAO has 7 business days to review and approve	External: The Review Takes Place At The County Administrative Office	Manual	None	7 Business Days	
16	After CAO Review, The Contracts Team Walks The Board Letter Downstairs To Executive Administration To Review & Sign After CAO Reviews	Internal: Takes Place Within BHRS	Manual	None	1 – 2 Business Day	
17	Executive Administration Returns The Board Letter To The Contracts Team	Internal: Takes Place Within BHRS	Manual	None	2 Business Days	
18	Contract System Supervisor & Contract Administrator Prep For The Board Of Supervisors	Internal: Takes Place Within BHRS	Manual	None	Items Have To Be Sent To The Board 10 – 14 Business Days In Advance	Overall Timeframe 83-83 business days

EXHIBIT B – SCOPE OF WORK CONTRACT LIFECYCLE MANAGEMENT (CLM) SYSTEM SERVICES

I. OBJECTIVE

This scope of work outlines the expectations, deliverables, and performance standards for the design, implementation, and ongoing support of a Contract Lifecycle Management System (CLMS) for Kern Behavioral Health and Recovery Services (BHRS). The Contractor is responsible for delivering a secure, intuitive, and fully integrated system that facilitates end-to-end contract management from procurement through contract close-out.

The CLMS shall include, at a minimum, the following features:

1. **Centralized Contract Repository:** Secure storage and easy retrieval of all contract documents with role-based access controls.
2. **Automated Workflows:** Customizable routing and approval processes to streamline contract creation, review, and execution.
3. **Electronic Signatures:** Integration with e-signature platforms to support legally binding digital signatures.
4. **Version Control and Audit Trails:** Full tracking of contract revisions and user activity for transparency and compliance.
5. **Alerts and Notifications:** Automated reminders for key dates such as renewals, expirations, and deliverable deadlines.
6. **Reporting and Analytics:** Dashboards and customizable reports to monitor contract performance, compliance, and key metrics.
7. **Search and Filter Capabilities:** Advanced search functions to locate contracts by keyword, vendor, date, or other criteria.
8. **Integration Capabilities:** Ability to interface existing BHRS systems such as financial, procurement, and document management platforms.
9. **User Training and Support:** Comprehensive onboarding, training materials, and ongoing technical support for system users.

II. SYSTEM REQUIREMENTS

The following is a general list of desired outcomes that are essential to be achieved as part of the Scope of Work. While not exhaustive, these outcomes provide a comprehensive framework that reflects the priorities and operational needs of Kern Behavioral Health and Recovery Services (BHRS) throughout the term of the Agreement.

A. CORE FUNCTIONALITIES

The CLMS must include, at minimum, the following capabilities:

1. **Procurement Alerts** – Automated notifications for RFPs, including initiation triggers (e.g., contract expiration, funding source) and due dates.
2. **Contract Creation** – Auto-generation of agreements and board letters using customizable templates, merge fields, and clause libraries.
3. **Negotiation & Approval** – Electronic routing, redlining, commenting, and approval workflows; vendor portal for external collaboration.
4. **Execution** – Integration with electronic signature platforms and distribution of executed contracts.
5. **Performance Monitoring** – Dashboards and reports to track compliance, financial thresholds, milestones, and obligations.
6. **Renewal & Amendment** – Alerts and workflows for renewals; escalation protocols for overdue items; dashboards for upcoming expirations.
7. **Termination & Archiving** – Automated workflows for contract closure; secure, searchable archive compliant with County retention policies.

B. SYSTEM FEATURES

1. 24/7 access via desktop and mobile
2. Drag-and-drop document upload
3. Role-based configurable dashboards
4. Centralized repository with version control and audit trail
5. Alerts for deadlines, renewals, breaches, and thresholds
6. Internal/external routing for review and approval
7. Customizable reporting and exportable audit logs
8. Integration with e-signature platforms (e.g., DocuSign, Adobe Sign)
9. HIPAA-compliant data handling and storage

C. DATA MIGRATION & INTEGRATION

1. Migration of existing contract records into the new system
2. Integration with County systems as required

III. IMPLEMENTATION MILESTONES

Phase	Timeline	Milestone Description
Project Initiation	Jul 1 – Sep 1, 2026	Define scope, assemble team, develop project plan
Requirements Gathering	Jul 1 – Sep 1, 2026	Document functional and technical specifications
Design & Development	Oct 1 – Dec 1, 2026	System architecture, module development
Testing & QA	Oct 1 – Dec 1, 2026	Unit, integration, and system testing
Training & Documentation	Jan 1 – Mar 1, 2027	User manuals, training sessions
Deployment	Apr 1 – Jun 1, 2027	System go-live, final configuration
Post-Implementation Review	Jul 1 – Sep 1, 2027	Performance monitoring, feedback collection

IV. Training and Onboarding

The Contractor shall provide comprehensive training and onboarding services to ensure effective adoption and use of the Contract Lifecycle Management System (CLMS) by all relevant BHRS personnel. These services shall include, but are not limited to:

- 1. Administrator and End-User Training:** Delivered remotely and/or onsite, tailored to the needs of various user roles.
- 2. Training Materials:** Provision of detailed user manuals, quick reference guides, and video tutorials to support self-paced learning.
- 3. Role-Based Training:** Customized instruction aligned with BHRS-specific workflows and responsibilities.
- 4. Ongoing Support Resources:** Continuous access to a searchable knowledge base and a responsive helpdesk for technical and functional support.
- 5. Refresher Training:** Optional post-deployment training sessions to reinforce system usage and accommodate updates or new features.
- 6. Accessibility and Language Support:** All training materials and sessions shall comply with accessibility standards and include bilingual support, at a minimum in English and Spanish.

V. Post-Implementation Support & Maintenance

The Contractor shall provide ongoing support and maintenance services to ensure the continued performance, security, and usability of the Contract Lifecycle Management System (CLMS). These services shall include:

- 1. Technical Support:** Available via phone, email, and an online support portal.
- 2. System Maintenance:** Regular updates, patches, and security enhancements to maintain system integrity and compliance.
- 3. Performance Monitoring:** Tools and support for monitoring system performance and ensuring optimal functionality.
- 4. Optimization Sessions:** Optional sessions to assess and improve system utilization based on user feedback and evolving needs.
- 5. Critical Issue Response:** Guaranteed response time of **30 minutes or less** for critical system issues.
- 6. Dedicated Project Manager:** A designated vendor representative assigned to BHRS for ongoing coordination and support.

VI. Compliance Requirements

The Contractor shall ensure that the CLMS complies with all applicable legal, regulatory, and organizational standards. At a minimum, the system must:

- 1. HIPAA Compliance:** Include data encryption, access controls, and audit logging to protect sensitive health information.
- 2. Regulatory Compliance:** Meet all relevant federal, state, and county data security and privacy regulations.
- 3. Audit Trails:** Maintain detailed logs of all user actions and document changes for accountability and transparency.
- 4. Records Retention:** Adhere to Kern County's records retention and archiving policies.
- 5. Security Controls:** Support multi-factor authentication (MFA) and enforce role-based access permissions.
- 6. Data Residency:** Store all data in U.S.-based facilities, with full disclosure of data residency locations.

VII. Performance Standards

To ensure accountability and high-quality service delivery, the Contractor shall meet the following performance standards throughout the term of the Agreement:

- 1. System Uptime:** Maintain a minimum system availability of **99.9%**, excluding scheduled maintenance periods.
- 2. Support Ticket Response:** Respond to non-critical support tickets within **one (1) business day**.

3. Critical Issue Resolution: Resolve critical system issues within **twenty-four (24) hours** of initial report.

4. Quarterly Performance Reviews: Conduct quarterly review meetings with BHRS to evaluate system usage, compliance metrics, and user satisfaction feedback.

5. Annual Roadmap Updates: Provide annual updates on the vendor's product roadmap, including planned enhancements, new features, and support improvements.

VIII. Business and/or Work Environment

The Contractor is expected to have the capability to conduct all aspects of the Software-as-a-Service (SaaS) implementation remotely. This includes system deployment, onboarding and training, operational support, ongoing maintenance, and security management. The Contractor shall demonstrate a high level of communication, collaboration, and commitment to achieving successful outcomes throughout the duration of the Agreement.

IX. Vendor Eligibility Requirements

To ensure accountability, service quality, and direct vendor support, BHRS requires that all proposals be submitted exclusively by vendors who are the original developers and/or direct providers of the proposed Contract Lifecycle Management System (CLMS). The following conditions apply:

1. Ineligible Parties: Third-party resellers, brokers, or implementation partners who do not own and directly support the software are not eligible to submit proposals.

2. Ownership and Responsibility: The proposing vendor must have full ownership or exclusive licensing rights to the software and be solely responsible for all aspects of implementation, training, support, and maintenance.

3. Verification: BHRS reserves the right to request documentation verifying the vendor's direct relationship to the software product and its development team.

E. Questions From Potential Contractors

All questions regarding this solicitation must be submitted in writing via email to: Jewelle Scales at jscales@kernbhrs.org. Phone inquiries will not be accepted. Only written questions will receive a response.

Responses to all submitted questions will be compiled and issued as an addendum to this solicitation. The deadline to submit questions is December 15, 2025. Questions received after this date will not be considered.

F. Proposal Submission

The potential contractors shall submit all required documentation as follows:

- ❖ one (1) written copy of all of the required documentation
- ❖ one (1) copy on thumb drive

The thumb drive (virus free) must be a standard Microsoft Windows (Word, Adobe, Excel etc.) compatible format readable by the County; using word processing software that is Windows based, preferably Microsoft Word. The potential contractor agrees to be fully responsible for any damage caused by any materials submitted to BHRS. Please submit all required documentation to:

Kern County General Services Division
REQUEST FOR QUALIFICATIONS TO DEVELOP A
CONTRACT LIFE MANAGEMENT SYSTEM
1115 Truxtun Ave., 3rd Floor
Bakersfield, CA 93301
Telephone (661) 868-3000

All of the required documentation may be delivered in person, by courier service or by mail to the address indicated above. **ALL REQUIRED MUST BE SEALED AND RECEIVED BEFORE 11:00 A.M. on January 5, 2026**, at the above office and address. Proposals submitted after the above deadline will not be accepted. It is strongly suggested that any proposers intending to hand deliver a proposal on the last day for submission arrive at the General Services Division third floor main lobby at least ten (10) minutes prior to the proposal receipt deadline to receive a "test" time stamp to validate the official current time. The time stamp clock in the main lobby of General Services will be the official time. Any Proposal received at or after 11:00 a.m. will be returned unopened.

Only one (1) submission from each potential contractor. For purposes of this solicitation, a potential contractor is defined to include a parent corporation of the potential contractor and any other subsidiary of that parent corporation. If a potential contractor submits more than one (1) set of required documentation, all documentation from that potential shall be rejected.

Submissions are not publicly opened.

G. Withdrawal and Submission of Modified Required Documentation

A potential contractor may withdraw their submission at any time prior to the submission deadline by submitting a written notification of withdrawal signed by the po or his/her authorized agent. The potential contractor must, in person, retrieve the entire sealed submission package. Another

submission may be submitted prior to the deadline. A submission may not be changed after the designated deadline for submission of the required documentation.

APPENDIX I

FREE SPEECH POLICY

Kern County Administrative Bulletin



ADMINISTRATIVE BULLETIN NO. 19

Issued: January 23, 2024

SUBJECT: FREE SPEECH POLICY

Purpose

The purpose of this Free Speech Policy is to inform all employees, employment applicants, and contractors of their constitutional rights to free speech, to petition the government for redress of grievances, to instruct representatives, and to freely associate and assemble. Unlawful discrimination based on the exercise of these rights is unacceptable and incompatible with the County's standards, as well as being a violation of the law. This Free Speech Policy also establishes the complaint and investigation procedure for alleged violations of these rights.

First Amendment Rights

Every County employee, employment applicant, and contractor has a constitutional right to free speech, to petition the government for redress of grievances, to instruct representatives, and to freely associate and assemble. ¹ For simplicity, this policy shall refer to such rights as "First Amendment Rights."

Every County employee, employment applicant, and contractor shall be free from any unlawful discrimination or retaliation by the County of Kern for exercising their First Amendment Rights while employed, while seeking employment, or while doing or seeking to do business for or with the County.

Free Speech Policy

The County of Kern remains committed to creating a professional environment in which the First Amendment Rights of all County employees, employment applicants, and contractors are protected.

It is a violation of the Constitutions of the United States and California for the County to unlawfully discriminate against County employees, employment applicants, or contractors because they exercised their First Amendment Rights.

¹ California Constitution, article I, sections 2(a) and 3(a); U.S. Constitution, amend. I.

Every County employee, and other person acting on behalf of the County, including members of the Board of Supervisors, is prohibited from unlawfully discriminating against, harassing, or retaliating against an employee, employment applicant, or contractor because the employee, employment applicant, or contractor exercised their First Amendment Rights, or because they filed a complaint or participated in an investigation under this Free Speech Policy.

All County employees and other persons acting on behalf of the County, including members of the Board of Supervisors, shall uphold and abide by this Free Speech Policy by cooperating fully in any investigation of a complaint of unlawful discrimination, harassment, or retaliation under this Free Speech Policy.

Persons in positions of authority, including managers and supervisors, shall act immediately on potential violations of this Free Speech Policy. They are responsible for knowing and enforcing this Policy and creating and maintaining a workplace free of discrimination, harassment, and retaliation, and should address potential problems before they become serious.

This Free Speech Policy applies at every level of the County and to every aspect of the workplace environment, including but not limited to, County events that occur outside of the physical workplace.

This Free Speech Policy shall be posted on the Kern County websites and in designated physical locations, and shall be attached to all County-issued Requests for Proposals (RFPs) and other solicitations for contract or grant proposals, County contracting forms and templates, and relevant notices to employees, employment applicants, and contractors.

Examples of unlawful discrimination:

- A department head recommends that a contract not be renewed because the contractor is politically active, regardless of their political position.
- A supervisor declines to recommend a supervisee for a promotion, or assigns a supervisee to less favorable job duties or to a less favorable location, because of the supervisee's union activity.
- A manager gives a supervisee poor job evaluations because the manager does not agree with their supervisee's political views.
- A county decision-maker declines to award a contract to provide social services to a particular community based organization because that organization actively campaigns for a particular bill or social movement.
- A county decision maker stops communicating with a potential contractor about a contract because the contractor has threatened to file lawsuit against the County in an unrelated case.

The California and U.S. Constitutions also provide specific First Amendment protection for County elected officials and other persons acting on behalf of the County, including volunteers and interns. This policy does not address such persons' rights.

Complaint and Investigation Procedure

Each employee, employment applicant, or contractor who believes that they have experienced unlawful discrimination or harassment described in this Policy may file a written complaint setting forth the specific facts and evidence supporting the complaint with the County Complaint Coordinator (see below). Such complaints shall be promptly forwarded to the Free Speech Retained Expert (see below). The complainant shall provide all documentary evidence, names of potential witnesses, and any other information believed by the complainant to be relevant to the complaint.

The County Complaint Coordinator shall initiate a formal investigation of the allegations in the complaint, interview all witnesses to the incident giving rise to the complaint (including the complainant and the person(s) against whom the complaint is directed), and issue written findings as to the merits of the complaint and the remedies that should be implemented to resolve the complaint under existing County ordinances, policies, and procedures. The County Complaint Coordinator shall have a period of not more than 75 business days from receipt of the complaint to conduct the investigation and to issue appropriate draft findings and recommended remedies. The 75-day time period may be extended due to the unavailability of a material witness, or with the written agreement of the complainant.

The County Complaint Coordinator shall provide the draft findings and recommended remedies to the Free Speech Retained Expert for review and approval. The County Complaint Coordinator shall also provide the Free Speech Retained Expert with a copy of the complaint, all information and documentary evidence provided by the complainant, all witness interview materials and documents provided by witnesses, and all information and documentary evidence developed by the County Complaint Coordinator in conducting the investigation.

In the event that the Free Speech Retained Expert does not approve the County Complaint Coordinator's draft findings and recommended remedies, the Free Speech Retained Expert shall prepare a written explanation of the reasons for non-approval. The Free Speech Retained Expert and County Complaint Coordinator shall meet and confer to resolve any disagreement or deficiencies, and both parties shall state their positions in writing. The County Complaint Coordinator shall then take all necessary steps to correct any deficiencies and re-submit the draft findings and recommended remedies to the Free Speech Retained Expert for review and approval.

In the case of any complaints in which there is an appearance of bias, conflict of interest, or insufficient independence with regard to the handling of the complaint by the County Complaint Coordinator, the Backup Complaint Coordinator (see below) shall conduct the investigation, and the Free Speech Retained Expert shall review and approve in the same manner as any investigation conducted by the County Complaint Coordinator.

The Free Speech Retained Expert shall conduct the investigation if both the Complaint Coordinator and the Backup Complaint Coordinator are conflicted. The County shall implement the Free Speech Retained Expert's findings and remedies.

Department heads shall be responsible for ensuring that all new employees and contract staff in their department receive a copy of this policy and sign an acknowledgment which shall be retained in the employee's personnel file (or a similar file for contract staff). In addition, department heads shall ensure that, on an annual basis, each employee in their department receives a copy of this policy and that an acknowledgment of receipt is contained in each employee's personnel file.

Department heads may establish departmental policies and internal complaint procedures provided that those policies and procedures are consistent with this Policy. Nothing in this Policy shall abrogate any legal evidentiary standards in a court of law.

Complaints Within the Scope of Civil Service Commission Rule 1810.00, et seq.

The Kern County Rules of the Civil Service Commission ("Civil Service Rules") provide a voluntary complaint procedure for some complaints that fall within the scope of this Policy. These Civil Service Rules apply to civil service employees or applicants for civil service employment complaining of unlawful discrimination, harassment, or retaliation based on religious, union, or political affiliation, or due to their participation in a government investigation.

A complainant whose complaint falls within the scope of both the Civil Service Rules and this Policy may choose to file their complaint using the procedure described in the Civil Service Rules, commencing at section 1820.00, or using the procedure otherwise described in this Policy, but not both. If a complainant invokes both procedures for the same complaint, the complainant shall be required to make a written election of which procedure they wish to have apply.

The Free Speech Retained Expert will review all such complaints consistent with the time limitations, procedure, and appellate rights set forth in Civil Service Rule 1820.00. The Free Speech Retained Expert will review and approve findings of fact and recommended remedies issued by the Equal Employment Opportunity Officer.

Under Civil Service Rule 1830.00-1830.02, either the complainant or the County may request a hearing before the Civil Service Commission. The Free Speech Retained Expert does not review the Civil Service Commission's decision for approval but will provide a report to the County and complainant regarding any comments, concerns, or recommendations related to the Commission's final decision, within 60-120 days of that decision.

County Complaint Coordinator: Sarah Gutierrez, Director of Diversity, Equity and Inclusion; (661) 868-3919; gutierrezsa@kerncounty.com

Backup County Complaint Coordinator: Mercedes Perez, Senior Human Resources Specialist; (661) 868-3915; perezmer@kerncounty.com

Free Speech Retained Expert:
Barry McDonald, (310) 506-4668; barry.mcdonald@pepperdine.edu
Apm/AB/AB-19_01-23-2024

By my signature below, I acknowledge that I have received and reviewed this Free Speech Policy (AB19) and I understand that a copy will be placed into my personnel file.

Printed Name	
_____	_____
Employee Signature	Date

[END OF RFQ]