

JACK BEACHAM, C.P.M. PURCHASING AGENT ROB COX, C.P.M., A.P.P. ASSISTANT PURCHASING AGENT

**Vendor Name:** 

RFQ NO. 2013-001

# REQUEST FOR QUALIFICATIONS FOR JUVENILE FORENSIC ASSESSMENT SERVICES

RESPONSES DUE OCTOBER 1, 2012 2:00 P.M.

RFQ NO. 2013-001

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# ATTACHMENT B - STATEMENT OF QUALIFICATIONS FORM

This Table of Contents is intended as an aid to respondents and not as a comprehensive listing of the RFQ package. Respondents are responsible for reading the entire RFQ package and complying with all specifications.

# PRE-QUALIFICATION CONFERENCE

All bidders are encouraged to attend a Pre-Qualification Conference to be held:

DATE: TUESDAY, SEPTEMBER 18, 2012

TIME: 2:00 P.M.

LOCATION: TARRANT COUNTY ADMINISTRATION BUILDING

PURCHASING DEPARTMENT CONFERENCE ROOM

100 E. WEATHERFORD, SUITE 303

FORT WORTH, TEXAS 76102

RSVP: Vendors planning to attend the pre-bid conference should RSVP, <u>in writing</u>, <u>via facsimile</u>, no later than 5:00 p.m., Monday, September 17, 2012.

Send RSVPs to Dianna Lee at (817) 884-2629.

Questions from bidders will be addressed at the pre-bid conference. Any vendor who submits a bid without attending the scheduled pre-bid conference does so at his own risk. Such applicant who submits a bid and does not attend the scheduled pre-bid conference waives any right to assert claims due to undiscovered conditions.

Tarrant County is soliciting qualifications for **JUVENILE FORENSIC ASSESSMENT SERVICES** for **JUVENILE SERVICES**.

**ORIGINAL AND FIVE (5) COPIES** 

OF

COMPLETED RESPONSES

MUST BE RECEIVED IN THE
PURCHASING DEPARTMENT
AT 100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76102
ON OR BEFORE OCTOBER 1, 2012 AT 2:00 P.M.

All responses, including a "NO RESPONSE", are due in the Purchasing Department by the due date, in sealed envelopes or boxes. All responses must be clearly marked with the RFQ Number, the name of the company submitting the qualifications package, and the date and time of opening on the outside of the envelope/box and/or Air Bill/Delivery Receipt. Original response must be clearly marked "ORIGINAL" and contain all original signatures.

Any response received after the date and/or hour set for the RFQ opening will not be accepted. Respondent will be notified and will advise Tarrant County Purchasing as to the disposition by either pick up, return at respondent's expense, or destroyed with written authorization of the Respondent. If responses are sent by mail to the Purchasing Department, the respondent shall be responsible for actual delivery of the qualifications package to the Purchasing Department before the advertised date and hour for opening of the RFQs. If mail is delayed either in the postal service or in the internal mail system of Tarrant County beyond the date and hour set for the RFQ due date, responses thus delayed will not be considered and will be disposed of as authorized.

Responses may be withdrawn at any time prior to the official opening. Alterations made before opening time must be initialed by bidder guaranteeing authenticity. After the official opening, responses become the property of Tarrant County and may not be amended, altered or withdrawn without the recommendations of the Purchasing Agent and the approval of Commissioners' Court.

Tarrant County is exempt from Federal Excise and State Sales Tax. The County is not exempt from Surplus Lines Tax or Texas Stamping Tax. Therefore, only applicable taxes must be included in this proposal.

No oral explanation in regard to the meaning of the request for qualifications will be made and no oral instructions will be given before the award of the contract. Request from interested respondents for additional information or interpretation of the information included in the qualifications package should be directed in writing to:

DIANNA LEE, C.P.M., SENIOR BUYER FAX: (817) 884-2629

<u>All documents associated with this RFQ</u> including but not limited to, the RFQ document, questions and their responses, addenda and special notices will be posted under the RFQ number on the Tarrant County website and available for download by respondents and other interested parties. <u>It is the bidders'/respondents' sole responsibility to review this site and retrieve all related documents up to and including the RFQ due date.</u>

The deadline for receipt of written questions shall be 12:00 (Noon), Fort Worth time, Wednesday, September 19, 2012. All questions and their responses will be posted on the website and available for download by bidders after the deadline for questions.

All Response Forms and Questionnaires must be fully completed and included in your response. Detailed specifications have been provided and any deviations or exceptions must be referenced on the form provided. Unless deviations are specifically stated herein, services will be provided according to the specifications at no additional charge.

This RFQ is issued in compliance with the Chapter 2254 of the Government Code. Negotiations shall be conducted with responsible vendor(s) who submit responses determined to be reasonably susceptible of being selected for award.

<u>CONFIDENTIALITY</u>: Any material that is to be considered confidential in nature must be clearly marked as such and shall be treated as confidential to the extent allowable in the Open Records Act. Trade secrets or confidential information <u>MUST</u> be placed in a separate envelope marked <u>"CONFIDENTIAL INFORMATION"</u> and <u>EACH PAGE</u> must be marked <u>CONFIDENTIAL INFORMATION."</u> Tarrant County will make every effort to protect these papers from public disclosure as outlined in LCG, Section 262.030(b) of the State of Texas County Purchasing Act.

Responses shall be opened so as to avoid disclosure of contents to competing offerors and kept secret during the process of negotiation. All responses that have been submitted shall be open for public inspection after the contract is awarded, except for trade secrets and confidential information contained in the proposals and identified as such.

The successful Contractor shall defend, indemnify, and hold harmless Tarrant Count from any and all liability or loss of any nature whatsoever arising out of or relating to the Contractor performing work on County premises, including, without limiting the generality of the foregoing coverage, any act or omission of the contractor, its agents, servants, employees, or invitees in the execution or performance of the contract.

<u>Continuing non-performance</u> of the vendor in terms of Specifications shall be a basis for the termination of the contract by the County. The County shall not pay for work, equipment, or supplies which are unsatisfactory. Vendors will be given a reasonable opportunity before termination to correct the deficiencies. This, however, shall in no way be construed as negating the basis for termination for non-performance.

The <u>contract may be terminated</u> by either party upon written thirty (30) days notice prior to cancellation.

Responses will be considered irregular if they show any omissions, alteration of form, additions or conditions not called for, or irregularities of any kind. However, Tarrant County reserves the right to waive any irregularities and to make award in the best interest of the County.

Tarrant County reserves the right to accept or reject in part or in whole any response submitted, and to waive any technicalities for the best interest of the County. Responses may be rejected, among other reasons, for any of the following specific reasons:

- 1. Responses received after the time limit for receiving proposals.
- 2. Responses containing any irregularities.
- Unbalanced value of any items.

Vendors may be disqualified and their responses not considered, among other reasons, for any of the following specific reasons:

- 1. Reason for believing collusion exists among the Vendors.
- 2. Reasonable grounds for believing that any Vendor is interested in more than one Response for the work contemplated.
- 3. The Vendor being interested in any litigation against the County.
- 4. The Vendor being in arrears on any existing contract or having defaulted on a previous contract
- 5. Lack of competency as revealed by a financial statement, experience and equipment, questionnaires, etc.
- Uncompleted work which in the judgment of the County will prevent or hinder the prompt completion of additional work, if awarded.
- 7. Respondents shall not owe delinquent property tax in Tarrant County.

It is the Respondent's sole responsibility to print and review all pages of the RFQ document, attachments, questions and their responses, addenda and special notices. The RFQ Signature Form must be signed and returned. Failure to provide signature on this form renders response non-responsive. Failure to complete and the submission of all required forms, including but not limited to the RFQ Signature Form, Certification of Eligibility, Reference Page, Questionnaires (when applicable), Addenda (including revised forms), and any other specified forms or documents will be grounds for rejection of entire response.

Due care and diligence has been used in preparation of this information, and it is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure and the verification of all information presented herein shall rest solely with the respondent. Tarrant County and its representatives will not be responsible for any errors or omissions in these specifications, nor for the failure on the part of the respondent to determine the full extent of the exposures.

The successful respondent may not assign their rights and duties under an award without the written consent of the Purchasing Agent. Such consent shall not relieve the assignor of liability in the event of default by the assignee.

# **SPECIAL TERMS AND CONDITIONS**

## I. CONTRACT TERMS:

- 1. <u>Contract Terms</u>: Successful vendor(s) will be awarded a contract, effective from date of award or notice to proceed as determined by Tarrant County Purchasing through September 30, 2013. At Tarrant County's option and approval by the vendor, the contract may be renewed for three (3) additional one (1) year periods, as further explained in Renewal Options. <u>Prices must remain firm for the entire contract</u>.
- 2. Renewal Options: Tarrant County reserves the right to exercise an option to renew the contract of the vendor for three (3) additional one (1) year periods, provided such option is stipulated in the Special Conditions and agreed upon by both parties. If the County exercises the right in writing, the Vendor shall update and submit any legal documents required during the initial solicitation by no later than thirty (30) calendar days prior to the commencement of the option period. These documents, if applicable, will be specified in the Special Conditions and include, but are not limited to, Insurance Certificates and Performance Bonds and must be in force for the full period of the option. If the updated documents are not submitted by the Vendor in complete form within the time specified, the County will rescind its option and seek a new solicitation.

#### II. SUBMITTALS TO TARRANT COUNTY:

- A. Include the following in your submission:
  - 1. RFQ Signature Form with signature (page 23).
  - 2. Certification of Eligibility Form with signature (page 24).
  - 3. Deficiencies and Deviations Form (page 25).
  - 4. References (page 22).
  - 5. Addendum Cover Page with signature (if applicable). It is the respondent's sole responsibility to continue to review the Tarrant County website and retrieve all addenda and related documents that may be posted prior to the RFQ due date.
  - 6. Disadvantaged Business Enterprises Form, with copy of applicable certificates (page 21). If you are not a DBE firm, mark form "N/A".
  - 7. Completed Juvenile Forensic Assessment Response Form (Attachment A) (Attachment A is a separate pdf download available from Tarrant County website.)
  - 8. Copy of Curriculum Vita.
  - 9. A sample evaluation report with all identifying information redacted.
  - 10. Copy of Texas professional license.
  - 11. Copy of Certificate of Insurance for professional liability policy. Minimum coverage should be \$1,000,000 per occurrence, \$3,000,000 aggregate.
- B. If interested in conducting Fitness to Proceed, Responsibility for Conduct or Discretionary Transfer evaluations, please include the following:
  - Completed Statement of Qualifications (Attachment B)
     (Attachment B is a separate pdf download available from Tarrant County website.)
  - Copies of CE certificates documenting the required continuing education courses in forensic psychology referenced in Professional Qualifications (Section XIII) and Statement of Qualifications (Attachment B).

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#### III. EVALUATION CRITERIA AND AWARD PROCESS:

- A. Only those proposals submitted by Mental Health Professionals who have current experience providing services to the targeted or similar population as described in this RFQ will receive award consideration. Preference will be given to Respondents who incorporate strengths-based principles and principles of trauma-informed care into their evaluations.
- B. Responses to this RFQ will be evaluated using the following criteria:
  - 1. Responsiveness Requested information included and thoroughness of response.
  - 2. Experience providing services to the targeted population.
  - Licenses and Certifications.
  - 4. Education and Qualifications.
  - 5. Knowledge and Skills.
  - References.
  - 7. Location of Services.
- C. Responses will be reviewed and evaluated by a panel composed of representatives of Tarrant County Juvenile Services. The review panel may schedule interviews with selected Respondents. The results of the review panel evaluation shall be presented to the Tarrant County Juvenile Board, which will formally recommend award of a contract.
- D. No award or acquisition of services can be made until the Tarrant County Juvenile Board and Commissioners Court approves such action.

#### E. Contract:

- 1. Successful respondent(s) will be required to sign a Professional Services Contract with Tarrant County.
- 2. The respondents will be reimbursed based on the following fee schedule:

a.	Standard Evaluation	. \$400 per evaluation
b.	Fitness to Proceed Evaluation	. \$500 per evaluation
C.	Responsibility for Conduct Evaluation	. \$500 per evaluation
d.	Psychosexual Evaluation	. \$500 per evaluation
e.	Discretionary Transfer (Adult Certification)	. \$600 per evaluation
f.	Bilingual Evaluations(add-on fee to the above evaluation).	. \$200 per evaluation

#### IV. STATEMENT OF WORK:

- A. Tarrant County Juvenile Services seeks State licensed doctoral-level Mental Health Professionals interested in providing forensic assessment services for clients of the department.
- B. These services will generally be requested for youth under the department's supervision or youth who have legal charges pending.

#### C. Evaluations:

#### 1. STANDARD PSYCHOLOGICAL EVALUATION (Fee \$400)

The concerns that prompt a request for psychological evaluation are usually related to questions about a youth's diagnosis, treatment needs and/or level of intellectual functioning. The results of the evaluation are needed for disposition by the court or in case planning in order to provide the most appropriate interventions available while the youth is being served by the probation department. In order to assist with this, the psychological evaluation will typically need to include the following:

- a. Diagnostic interview with youth.
- b. Collateral contacts where possible (e.g. parent interview, contact with therapists or probation officers, etc.).
- c. Estimate of intellectual abilities (e.g., KBIT-2, WASI-II or WISC-IV).
- d. Estimate of academic achievement (e.g., WRAT-4 or WIAT-2).
- e. Personality assessment.
- f. Diagnostic formulation, including any substance abuse diagnoses.
- g. Treatment recommendations and prognosis, including the identification of any individual or systemic issues that may impact treatment planning, as well as recommendations to address potential barriers to treatment.

If the youth has a history of arson, the evaluation should also include an opinion on the youth's propensity for future fire-setting as well as an explanation of the basis for the opinion.

#### 2. SPECIALIZED PSYCHOLOGICAL EVALUATIONS (Fee \$500)

Specialized evaluations require specialized skills or credentials of the evaluator as well as often requiring variations in the assessment procedures or use of specialized assessment tools. The guidelines for Standard Psychological Evaluations do not necessarily apply to these specialized assessments. Instead, it is expected that clinicians will address the specific referral questions according to current professional standards of practice. The most common types of specialized evaluations are explained as follows.

#### a. Fitness to Proceed Evaluations:

The purpose of this evaluation is to determine if the child has a mental illness or mental retardation that interferes with his/her "capacity to understand the proceedings in juvenile court or to assist in the child's own defense" (Texas Family Code, Section 55.31). The evaluation must consider relevant factors required in Code of Criminal Procedures, 46B.024 and the report must comply with requirements in 46B.025. Traditional assessment measures may be needed to establish diagnoses but will not be sufficient to answer the specific forensic question.

## b. Lack of Responsibility for Conduct Evaluations:

The purpose of this evaluation is to determine if, at the time the alleged offense was committed, the youth lacked the substantial capacity to appreciate the wrongfulness of the conduct or to conform his/her conduct to the requirements of the law (Texas Family Code, Section 55.51) as a result of mental illness or mental retardation. Traditional assessment measures may be needed to establish diagnoses but will not be sufficient to answer the specific forensic question. Specific interview questions or specialized assessment measures focused on issues related to responsibility for conduct are necessary.

#### c. **Psychosexual Evaluations:**

Juveniles who have been adjudicated for committing a sexual offense are routinely ordered to have a psychosexual evaluation. The purpose of this evaluation is to determine the youth's risk for sexual recidivism and to provide a recommendation to the court about the most appropriate type and intensity of intervention. This typically requires all components of the standard psychological evaluation described above as well as specific assessment of risk factors associated with sexual recidivism. It is also important to identify protective factors in the youth or family.

#### 3. <u>DISCRETIONARY TRANSFER (CERTIFICATION) EVALUATIONS (Fee \$600)</u>

These evaluations are requested in order to assist the court in cases where a petition for Discretionary Transfer to Criminal Court (Texas Family Code 54.02) has been filed. The primary questions to be answered in these evaluations are related to the level of sophistication and maturity of the child, the level of risk the child poses to the community and the child's amenability to treatment within the juvenile system. This typically requires all components of the standard psychological evaluation above, as well as more extensive collateral contacts and specific forensic measures related to risk of re-offending and treatment amenability.

# 4. <u>BILINGUAL EVALUATIONS (Fee \$200)</u>

This refers to any assessment of a youth whose primary language is not English. The specific referral question could fall into any of the other categories. It is preferable that these evaluations be conducted fully in the youth's primary language, including the use of assessment measures validated for use with non-English speaking populations. This budget of \$200 will be added to the standard rate for the relevant type of evaluation.

#### V. REQUIRED PROVISIONS:

- A. Assessment activities will be conducted at the Juvenile Center at 2701 Kimbo Road, unless otherwise specified. All available client background information as well as the specific reason for referral will be provided by the department for the examiner's review prior to the scheduled evaluation. This information can be sent via email or fax, depending on the proposer's preference. If additional records are needed, Juvenile Services can provide by contacting the assigned probation officer to request these. The final report is generally expected one week following the date of the evaluation, unless otherwise specified. The final report should be sent to the department contact person via email, fax or mail on or before the agreed due date.
- B. The provider may invoice the department for services provided on a per service or monthly basis. The invoice should include the name of the person evaluated, date of service, and amount owed. If services are provided beyond the evaluation services outlined above, such as court testimony, consultation, administration of usual test measure, or offering opinions based on records reviews, these services should be invoiced according to standard units of service or hourly rates. The department may also be invoiced for expenses related to travel and actual time spent in the case of youth who do not appear for their appointments.

#### VI. EVALUATION REPORT:

- A. In order to facilitate clear communication to the various audiences of these evaluations, the following general format should be followed. While there may be modifications needed according to the specific referral question or specific issues relevant to the child/family, these general report sections should be included and appropriate sub-headings should be used within the sections.
  - REASON FOR REFERRAL
  - ASSESSMENT PROCEDURES/SOURCES OF INFORMATION

to include specific listing of documents reviewed

• BACKGROUND INFORMATION

Identifying Data and Family History History of Presenting Problems Developmental and Medical History Psychiatric Treatment History

Academic History

Legal History

Substance Abuse History

- BEHAVIORAL OBSERVATIONS
- TEST RESULTS

Intelligence/Cognitive Testing
Academic Achievement Testing
Emotional/Personality Testing
(any other specific categories included should also be specified).

DIAGNOSIS

AXIS I:

AXIS II:

AXIS III:

AXIS IV:

AXIS V:

SUMMARY AND RECOMMENDATIONS

Recommendations should be numbered or bulleted.

#### VII. RECOMMENDATIONS:

A. Each psychological evaluation should include recommendations regarding appropriate interventions. It is most helpful for these recommendations to describe the type of intervention and the appropriate level of intensity, rather than naming specific programs. Specific programs may be listed only as examples accompanying the general description of the type of service. If it is unlikely that the type of intervention being recommended is available, that should be noted and alternatives identified.

#### VIII. CHILD ABUSE REPORTING:

A. If, during the course of an evaluation, the juvenile discloses child abuse or neglect, the provider will need to make a CPS report in accordance with applicable child abuse reporting laws (Texas Family Code 261.101). Please do not assume that the juvenile has told the same details to juvenile services or that the abuse has already been reported. This should then be documented in the final evaluation report and the provider must notify the assigned probation officer. If the youth making the disclosure is being held in the detention center at the time of the evaluation, the Facility Administrator or his designee should be notified of the disclosure and intent to make a CPS report immediately following the evaluation.

#### IX. USE OF SUPERVISED CLINICIANS:

A. The use of supervised clinicians is allowed to conduct a portion of the testing, provided that the psychologist with the direct appointment does meet directly with the juvenile and is ultimately responsible for the evaluation and final report, including any required courtroom testimony. The final report should specify any portions of the evaluation conducted by a supervised clinician as well as providing the name, title and credentials of that person.

#### X. COURT TESTIMONY:

A. While this does not happen often, the provider should be prepared to testify in court regarding his/her evaluation. Should this issue arise, the department will provide as much advance notice as possible. The provider may submit an invoice for this service billed at a standard hourly rate.

#### XI. RELEASE OF RECORDS:

A. The final report becomes the property of the juvenile court and may not be released to or discussed with any third party (including the juvenile's guardian), other than juvenile justice professionals without the court's authorization. The provider will not be expected to provide additional consultation to the youth's attorney or family following the assessment. Once the report has been submitted to the department, any further consultation services must be facilitated through the court and the probation staff.

#### XII. GOALS AND OUTCOMES:

A. The department will collect information on evaluation outcomes, as required by department policy and as listed below:

#### OUTCOMES:

- a. 95% of evaluations scheduled were able to obtain substantial engagement of the youth in the evaluation process resulting in valid findings.
- b. 90% of evaluations performed were completed within agreed time frames.
- c. 90% of evaluations completed comprehensively addressed the reason for "referral" without need for addenda.
- d. .90% of evaluation materials used relied on empirically-validated, up-to-date, test materials.
- e. 98% of evaluations scheduled were completed at agreed location.

#### 2. OUTPUT

a. Number of evaluations performed.

#### XIII. PROFESSIONAL QUALIFICATIONS:

- A. As noted above, there are different levels of expertise required of the different types of evaluations. These required qualifications are guided by statutory requirements noted below.
  - General qualifications required to conduct forensic evaluations for the juvenile court are set forth in Section 51.20 of the Texas Family Code and include the following:
    - a. Disinterested expert.
    - b. Physician, psychiatrist or psychologist.
    - c. Qualified by education and clinical training in mental health or mental retardation.
    - d Experienced in forensic evaluation.
  - 2. Additional qualifications required to conduct <u>Fitness to Proceed Evaluations</u> are set forth in Chapter 46B.022 of the Code of Criminal Procedure and include the following:
    - a. Physician or psychologist (with doctoral degree in psychology) licensed in this state;

#### <u>AND</u>

- b. As appropriate, certification by:
  - American Board of Psychiatry and Neurology with added or special qualifications in forensic psychiatry;
  - ii. American Board of Professional Psychology in forensic psychology.

#### <u> UK</u>

- c. Training consisting of:
  - i. At least twenty-four (24) hours of specialized forensic training relating to incompetency or insanity evaluations; and
  - ii. at least eight (8) hours continuing education regarding forensic evaluations in the twelve (12) months proceeding appointment.

#### AND

- d. Continuing education:
  - i. Six (6) hours of required continuing education in courses in forensic psychiatry or psychology in either of the reporting periods in the twenty-four (24) months preceding the appointment.

#### XIII. PROFESSIONAL QUALIFICATIONS (cont.):

- Additional qualifications required to conduct <u>Responsibility for Conduct</u> evaluations for the court are set forth in Chapter 46C.102 of the Code of Criminal Procedure and include the following:
  - a. Physician or psychologist (with doctoral degree in psychology) licensed in this state:

## <u>AND</u>

- b. As appropriate, certification by:
  - American Board of Psychiatry and Neurology with added or special qualifications in forensic psychiatry; or
  - ii. American Board of Professional Psychology in forensic psychology;

#### **OR**

- c. Experience in training consisting of:
  - i. At least twenty-four (24) hours of specialized forensic training relating to incompetency or insanity evaluations; or
  - ii. Five (5) years experience before January 1, 2004 and 8+ hours of continuing education related to forensic evaluation within the past twelve (12) months preceding the appointment and documented with the court;

#### **AND**

- d. Six (6) hours of required continuing education in courses in forensic psychiatry or psychology in either of the reporting periods in the twenty-four (24) months preceding the appointment.
- 4. While there are currently no specialized qualifications required by Texas statute related to conducting <u>Discretionary Transfer</u> evaluations, this department has opted to require forensic experience consistent with the requirements for conducting Fitness to Proceed or Responsibility for Conduct Evaluations.
- Clinicians interested in conducting <u>Psychosexual</u> evaluations should be able to demonstrate advanced training in sex offending issues and assessment of risk for sexual recidivism.

#### XIV. PROCEDURES FOR SELECTION FROM QUALIFIED PROVIDER LIST:

- A. All Mental Health Professionals determined to meet qualifications and approved by the Tarrant County Juvenile Board and Commissioners Court will be placed on a Providers List.
- B. Providers will be assigned to a client based on the needs of the individual case, provider's background and strengths, and provider's availability. Every effort will be made to evenly distribute cases among the approved providers.



# TARRANT COUNTY

# HISTORICALLY UNDERUTILIZED BUSINESSES (HUB) POLICY

#### I. POLICY STATEMENT

The Tarrant County Commissioners Court, being the policy development and budgetary control unit of county government, will strive to ensure that all businesses, regardless of size, economic, social or ethnic status have an equal opportunity to participate in the County's procurement processes. The County is committed to promote full and equal business opportunity for all businesses to supply the goods and services needed to support the mission and operations of county government, and seeks to encourage the use of certified historically underutilized businesses (HUBs) through the use of race, ethnic and gender neutral means. It is the policy of Tarrant County to involve certified HUBs to the greatest extent feasible in the County's procurement of goods, equipment, services and construction projects while maintaining competition and quality of work standards. The County affirms the good faith efforts of firms who recognize and practice similar business standards.

#### II. DEFINITIONS

<u>Historically underutilized businesses (HUBs)</u>, also know as a disadvantaged business enterprise (DBE), are generally business enterprises at least 51% of which is owned and the management and daily business operations are controlled by one or more persons who is/are socially and economically disadvantaged because of his or her identification as a member of certain groups, including women, Black Americans, Mexican Americans and other Americans of Hispanic origin, Asian Americans and American Indians.

<u>Certified HUBs</u> includes business enterprises that meet the definition of a HUB and who meet the certification requirements of certification agencies recognized by Tarrant County.

<u>Businesses</u> include firms, corporations, sole proprietorships, vendors, suppliers, contractors, subcontractors, professionals and other similar references when referring to a business that provides goods and/or services regardless of the commodity category.

<u>Statutory bid limit</u> refers to the Texas Local Government Code provision that requires competitive bidding for many items valued at greater than \$50,000.

#### III. POLICY GUIDELINES

- A. Tarrant County, its contractors, their subcontractors and suppliers, as well as all vendors of goods, equipment and services, shall not discriminate on the basis of race, color, creed, gender, age, religion, national origin, citizenship, mental or physical disability, veteran's status or political affiliation in the award and/or performance of contracts. All entities doing business or anticipating doing business with the County shall support, encourage and implement affirmative steps toward a common goal of establishing equal opportunity for all citizens and businesses of the county.
- B. Tarrant County will use and recognize the State of Texas certification process in conjunction with the implementation of this policy. The County may recognize other agencies' certification processes recognized by the State of Texas. Tarrant County reserves the right to review the certification status of any vendor applying to do business with the County. This review will be accomplished to determine the validity and authenticity of the vendor's certification as a HUB.
- C. The Commissioners Court may establish HUB target goals. Through a systematic approach of soliciting quotes, responses and proposals from certified HUBs and in compliance with applicable state and federal law this policy will strive to meet those goals.
  - 1. Target goals should consider:
    - the availability of HUB firms within the specific category of goods or services to be procured; and
    - the diversity of the county's population.
  - 2. The goals should be reviewed and amended periodically.
  - 3. The program may apply to all County procurements including construction and professional services.
  - 4. Particular attention will be given to HUB participation on purchases in excess of the statutory bid limit.
  - 5. The Commissioners Court herein establishes a 20% good faith target goal for Tarrant County.

- D. Tarrant County will actively seek and encourage HUBs to participate in all facets of the procurement process by:
  - Continuing to increase and monitor a database of certified HUB vendors, professionals and contractors. The database will be expanded to include products, areas of expertise and capabilities of each HUB firm.
  - 2. Continuing to seek new communication links with HUB vendors, professionals and contactors to involve them in the procurement process.
  - Continuing to advertise responses on the County's website and in newspapers including newspapers that target socially and economically disadvantaged communities.
  - 4. Continuing to provide copies of bid specifications to minority Chambers of Commerce.
- E. As prescribed by law, the purchase of one or more items costing in excess of the statutory bid limit must comply with the competitive bid process. Where possible, those responses will be structured to include and encourage the participation of HUB firms in the procurement process by:
  - 1. Division of proposed requisitions into reasonable lots in keeping with industry standards and competitive bid requirements.
  - Where feasible, assessment of bond and insurance requirements and the designing of such requirements to reasonably permit more than one business to perform the work.
  - 3. Specification of reasonable, realistic delivery schedules consistent with the County's actual requirements.
  - 4. Specifications, terms and conditions reflecting the County's actual requirements are clearly stated, and do not impose unreasonable or unnecessary contract requirements.
- F. A HUB Policy statement shall be included in all specifications. The County will consider the bidder's responsiveness to the HUB Policy in the evaluation of responses and proposals. Failure to demonstrate a good faith effort to comply with the County's HUB policy may result in a bid or proposal being considered non-responsive to specifications.
- G. The Purchasing Department will actively seek the participation of HUB firms in the quotation process for purchases under the statutory bid limit. HUB firms will be identified on the computerized database and linked to the commodities they represent. Buyers will be encouraged to use available internal and external databases of certified HUB firms.

H. Nothing in this policy shall be construed to require the County to award a contract other than to the lowest responsive bidder as required by law. This policy is narrowly tailored in accordance with applicable law.

#### IV. ADMINISTRATIVE GUIDELINES

- A. The Purchasing Department shall serve as the County's HUB Office with responsibility for the implementation, monitoring and general operations of the HUB policy. The Purchasing Agent shall serve as the County HUB Officer.
  - The HUB Officer will establish procedures to implement this policy across the full spectrum of the procurement process. The County HUB Office will periodically review with department head and elected officials regarding procurement opportunities.
  - 2. Managing the policy and training buyers and other County personnel in order to meet County goals will be the responsibility of the HUB Office.
  - The HUB Office will cooperate with other local government entities to increase HUB participation throughout the county and region. The HUB Office is encouraged to participate in educational and other outreach programs to assist HUB firms.
  - 4. The HUB Officer will receive and review complaints and recommendations regarding the implementation of the HUB Policy and the good faith efforts of bidders. Further, the HUB Office will audit for compliance to the HUB Policy on eligible projects after award, during the performance of the contract and after completion, while also making any recommendations to Commissioners Court regarding any irregularities or misrepresentation of facts as they relate to compliance with the policy. The HUB Office will review documentation submitted by HUB firms in compliance with this policy.
  - 5. An annual report along with recommendations shall be provided to the Commissioners Court and Purchasing Board. The annual report will provide statistical data and efforts reflected in the number of purchase orders, value of goods and services purchased, percentages to HUB firms, and outreach and marketing efforts. Other statistics may be required or requested by the Commissioners Court or Purchasing Board.

#### 510 Historically Underutilized Businesses Policy

Adopted: Court Order 64788 (December 17, 1990) Amended: Court Order 69958 (December 7, 1993) Amended: Court Order 99651 (December 28, 2006)

#### FOR DISADVANTAGED BUSINESS ENTERPRISES ONLY

<u>Disadvantaged Business Enterprises (DBE)</u> are encouraged to participate in Tarrant County's bid process. The Purchasing Department will provide additional clarification of specifications, assistance with Bid Proposal Forms, and further explanation of bidding procedures to those DBEs who request it.

Representatives from DBE companies should identify themselves as such and submit a copy of the Certification.

The County recognizes the certifications of both the State of Texas General Services Commission HUB Program and the North Central Texas Regional Certification Agency. All companies seeking information concerning DBE certification are urged to contact.

Texas Procurement and Support Services Statewide HUB Program 1711 Jacinto Blvd. PO Box 13047 **O** Austin, TX 78711-3047 (512) 463-5872 North Central Texas Regional Certification Agency 624 Six Flags Drive, Suite 100 Arlington, TX 76011 (817) 640-0606

If your company is already certified, attach a copy of your certification to this form and return with response.

OR

COMPANY NAME:	
REPRESENTATIVE:	
ADDRESS:	
TELEPHONE NO	FAX NO
Indicate all that apply: Minority-Owned Business Enterprise Women-Owned Business Enterprise  Disadvantaged Business Enterprise	

THE ORIGINAL AND FIVE (5) COPIES OF THIS FORM MUST BE RETURNED WITH RESPONSE!

#### **VENDOR REFERENCES**

Please list three (3) references, **other than Tarrant County**, who can verify your performance as a vendor. Performance includes but shall not be limited to, sales and/or service, delivery, invoicing, and other items as may be required for Tarrant County to determine your firm's ability to provide the intended goods or service of this RFQ. The County prefers references to be from customers for whom your firm has provided the same items (sales and/or services) as those specified in this RFQ. Inaccurate, obsolete or negative responses from the listed references could result in rejection of your response.

REFERENCE ONE	
GOVERNMENT/COMPANY NAME:	
LOCATION:	
CONTACT PERSON AND TITLE:	
TELEPHONE NUMBER:	
EMAIL:	
SCOPE OF WORK:	-
CONTRACT PERIOD:	-
REFERENCE TWO	
GOVERNMENT/COMPANY NAME:	
LOCATION:	
CONTACT PERSON AND TITLE:	
TELEPHONE NUMBER:	
EMAIL:	_
SCOPE OF WORK:	_
CONTRACT PERIOD:	-
REFERENCE THREE	
GOVERNMENT/COMPANY NAME:	
LOCATION:	
CONTACT PERSON AND TITLE:	
TELEPHONE NUMBER:	
EMAIL:	_
SCOPE OF WORK:	-
CONTRACT PERIOD:	_

THE ORIGINAL AND FIVE (5) COPIES OF THIS FORM MUST BE RETURNED WITH RESPONSE!

#### **RFQ SIGNATURE FORM**

The undersigned agrees this response becomes the property of Tarrant County after the official opening.

The undersigned affirms he has familiarized himself with the local conditions under which the work is to be performed; satisfied himself of the conditions of delivery, handling and storage of equipment and all other matters which may be incidental to the work, before submitting a response.

The undersigned agrees, if this response is accepted, to furnish any and all items/services upon the terms and conditions contained in the Scope of Services. The period for acceptance of this Response will be ninety (90) calendar days from date of opening of the responses.

The undersigned affirms that they are duly authorized to execute this contract, that this Response has not been prepared in collusion with any other potential respondent, nor any employee of Tarrant County, and that the contents of this Response have not been communicated to any other respondent or to any employee of Tarrant County prior to the official opening of this response.

Vendor hereby assigns to purchaser any and all claims for overcharges associated with this contract which arise under the antitrust laws of the United States, 15 USCA Section 1 <u>et seq.</u>, and which arise under the antitrust laws of the State of Texas, Tex. Bus. & Com. Code, Section 15.01, et seq.

The undersigned affirms that they have read and do understand the specifications and any attachments contained in this Request for Qualifications. *Failure to sign and return this form will result in the rejection of the entire qualification package.* 

NAME AND ADDRESS OF COMPANY:	AUTHORIZED REPRESENTATIVE:		
	Signature		
	Data		
	Name		
	Title		
Tel. No	FAX No		
E-Mail Address:			
AFTER HOURS EMERGENCY CONTACT:			
Name:	_ Tel. No		
COMPANY IS:			
Business included in a Corporate Income Tax	x Return?YESNO		
Corporation organized & existing unde	er the laws of the State of		
Partnership consisting of			
Individual trading as			
Principal offices are in the city of			

THIS FORM MUST BE SIGNED AND THE ORIGINAL AND FIVE (5) COPIES RETURNED WITH RESPONSE!

# CERTIFICATION OF ELIGIBILITY (This provision applies if the anticipated contract exceeds \$25,000)

By submitting a bid or proposal in response to this solicitation, the bidder/proposer certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors.

•	e list between the time of bid/proposal su otify the Tarrant County Purchasing Agent. t for default.	
Authorized Signature		

THIS FORM MUST BE SIGNED AND THE ORIGINAL AND FIVE (5) COPIES RETURNED WITH RESPONSE!

# **DEFICIENCIES AND DEVIATIONS FORM**

Following is a listing of ALL deficiencies and deviations from the requirements and/or provisions as outlined in this Request for Qualifications. Unless specifically listed here, your response will be considered to be in FULL compliance with the RFQ. Respondent assumes the responsibility of identifying all deficiencies and deviations and if not identified, all requirements of the RFQ stipulated must be fulfilled at no additional expense to Tarrant County.

THE ORIGINAL AND FIVE (5) COPIES OF THIS FORM MUST BE RETURNED WITH RESPONSE!