

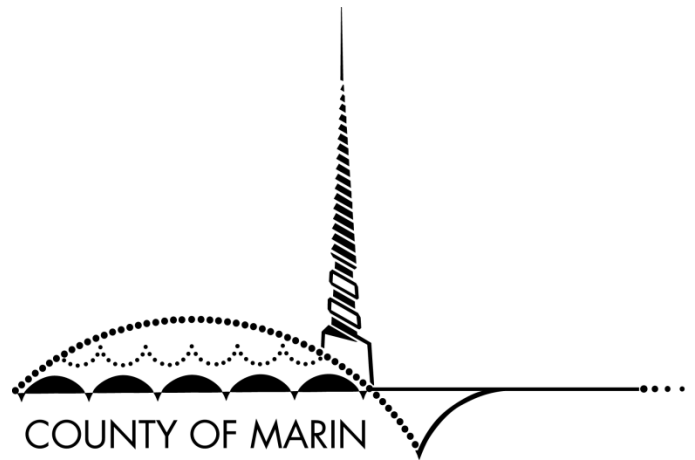
COUNTY OF MARIN

Request for Proposals 2907

County Budget Software System

Date Released:

5:00 p.m. PT on Tuesday, August 18, 2026



Declaration of Interest Due By:

5:00 p.m. PT on Thursday, September 10, 2026

Submittals Due By:

5:00 p.m. PT on Wednesday, September 30, 2026

Office of the County Executive
3501 Civic Center Drive, Suite 325
San Rafael, CA 94903
Attention: Sana Danish
Sana.Danish@MarinCounty.Gov

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I. Project Information and Scope of Work

A. Overview

The Marin County Office of the County Executive (OCE) is requesting proposals for a budget development and publication software system within the scope of work detailed in this Request for Proposal (RFP).

B. Proposal Requested

The Marin County Office of the County Executive (OCE) is soliciting proposals from qualified vendors to provide an integrated budget development and publication software suite capable of budget and capital plan development and budget and capital plan book production. The solution must be flexible enough to handle the full spectrum of budgeting and reporting needs at the County – work performed by everyone from budget and finance professionals to subject matter experts needing quick reports to administrative staff doing routine journal entries.

We are specifically calling for solutions that can serve the dual purpose of standard reporting and planning along with production capabilities for the County’s annual budget book of record and its capital plan book. Our existing processes require the use of several different tools for these respective capabilities.

The software suite needs to be user-friendly, easy to learn, and digitally compliant, with flexibility and customizable reporting capabilities. Public-facing materials, including online and PDF budget materials, need to be accessible based on current legal standards and requirements. County staff will use the software to complete all budget development and fiscal projection tasks, financial reporting, and data entry as part of the annual budget development cycle.

Additionally, for a Capital Improvement Plan (CIP) management system, the County seeks a solution that will improve visibility into capital project scope, status, schedule, budget, expenditures, funding, and priorities. It should integrate with Tyler Enterprise ERP (formerly Munis) by Tyler Technologies to reduce duplicate data entry and improve alignment between project planning and financial information. It needs to provide configurable reporting, dashboards, workflows, and document-generation capabilities. The system should support multi-year capital planning, including project requests, scoring, prioritization, funding scenarios, project ranking, and planning-year assignments. The solution should allow the County to evaluate proposed and active projects based on configurable criteria, available funding, strategic priorities, facility needs, infrastructure condition, regulatory requirements, and other factors.

C. Marin County Background

Incorporated in 1850 and one of the nine San Francisco Bay Area counties, Marin County is located north of San Francisco across the Golden Gate Bridge, and west of the East Bay across the Richmond-San Rafael Bridge. Part of the interconnected Bay Area economy, many residents in Marin commute across county lines for work – and many Marin businesses employ workers from nearby counties. Marin County is also known for its extensive natural, recreational and agricultural lands – nearly 85 percent of the county's land area is protected open space and agriculture.

Marin County has 11 incorporated cities and towns that provide municipal services to residents within their jurisdictions: Belvedere, Corte Madera, Fairfax, Larkspur, Mill Valley, Novato, Ross, San Anselmo, San Rafael, Sausalito, and Tiburon. Marin County government, directed by the elected Board of Supervisors, provides municipal services to all unincorporated areas of the county. These municipal services include law enforcement, parks, libraries, fire, land use permitting, and roads and infrastructure. Additionally, certain County services, as dictated in state and federal law and often funded through intergovernmental revenues, serve all residents in Marin, including the District Attorney and other criminal justice functions, health and human services, elections, property assessment and tax collection.

The County of Marin is an organization comprised of 23 departments with more than 2,600 positions (FTE). It has a FY 2026-27 Operating Budget of approximately \$900 million. The six Board of Supervisors community priorities in 2026 include:

- Increasing affordable housing and homelessness response
- Building a racially equitable community
- Reducing carbon emissions and building climate-resilient communities

- Enhancing disaster and emergency preparedness
- Investing in Marin County's infrastructure
- Improving community and economic vitality

The County organization is divided into four functional groups that represent general categories of service to County residents:

- Operations and Resources
- Health and Human Services
- Justice and Welfare
- Community and Environment

Most County departments are directed by officials appointed by the Board of Supervisors, while the Assessor-Recorder-County Clerk, Sheriff Coroner, and District Attorney are each elected by County residents to serve four-year terms.

D. Introduction and Project Background

The County of Marin seeks proposals from qualified vendors to provide a modern, cloud-based Budget Development and Capital Improvement Program (CIP) Management System that integrates with the County's existing Tyler Enterprise ERP. The County's current processes rely on multiple disconnected tools, manual spreadsheets, and labor-intensive publishing workflows.

The County's goal is to implement a unified platform that enhances accuracy, transparency, collaboration, and efficiency during the development, review, analysis, approval, and reporting of the annual operating budget and multi-year CIP. The system must also support production of the County's annual Proposed Budget Book, CIP Book, and Final Budget Book—with the State Controller's Office (SCO) compliance required only for the Final Budget Book.

[June Proposed Budget FY 2026-28 and Related Documents](#)

[June Proposed Capital Improvement Plan FY 2027-31](#)

[FY 2025-26 Final Budget Book](#)

E. Preferred Vendor Qualifications

1. Demonstrated experience with county or municipal government implementations.
2. Proven integration experience with Tyler Enterprise ERP (formerly Munis) by Tyler Technologies.
3. Stable customer base using the proposed solution.
4. Strong usability and accessibility features.
5. Accessible reporting tools not requiring programming specialists.
6. Capability to provide full implementation services, training, and post-launch support.

F. Scope of Work (specific scope to be developed with contractor)

A. Specifications for the proposed software system:

1. Software Requirements

- i. Cloud-based solution with secure access.
- ii. Compatibility with existing County financial systems, specifically Tyler Enterprise ERP (formerly Munis), or customizable exports to facilitate uploading into current financial system.
- iii. Compatibility with existing County position management systems, specifically the County's human resources system Tyler Enterprise ERP, with ability to facilitate salary and benefit calculations and projections and position budgeting in a user-friendly way.
- iv. Robust fund, account, and classification mapping tools that allow County staff to map imported Tyler Enterprise ERP or spreadsheet data to required fund, account, and classification structures as needed.
- v. User-friendly, digitally compliant interface, including customizable dashboards.
- vi. Highly qualified proposals will have the ability to produce a Proposed Budget and CIP, and a Final Budget which meets State Controller's Office (SCO) requirements.
- vii. Multi-user access with different roles and permissions for County departments, Office of the County Executive, and other departmental peer review access, where needed.
- viii. Intuitive navigation to support an easy learning curve.

2. Administrative Requirements

- i. Single sign-on using SAML v2.0 with integration to the County's Identity and Authentication Management platform and layered access for enhanced security.
- ii. Rollover of budget information from one fiscal year to another. Centralized user and role management for OCE and Department fiscal officer.

3. Functional Requirements

- i. Budget production analysis and reporting
 1. Net County Cost target calculations.
 2. Average expense and revenue trends and projections.
 3. Ability to model scenarios for expenses and revenues.
 4. Ability to track positions by job classification, benefits, cost of living adjustments, which tie to general ledger cost centers.
 5. Ability to provide narrative summaries for why budget recommendations are provided, as well as when they are approved or rejected.

- ii. Full integration of position control data with budget data.
- iii. Separate, fully functional test/development environment and production environment.
- iv. Ability to track capital project budgets.
- v. Ability to create and automatically update internal or public-facing dashboards based on budget data, inclusive of budget narratives, executive summaries, and the ability to include key performance indicators and other supplemental information.
- vi. Ability to publish a California State Controller's Office (SCO) and GFOA compliant budget book using built-in publication capabilities.
- vii. Support for long-term data archiving and report access.
- viii. Custom workflows for budget entry and reporting between departmental staff and the central budget office for the County.
- ix. User-defined groupings and fields to support the variety of reporting needs. E.g., preferably the ability for end users to add comments at any level of granularity within the general ledger, preferably in a dedicated adjacent column rather than through Excel-style cell comments.

4. Reporting Standards

- i. User-friendly, customizable, and accessible reporting with ad-hoc capabilities and graphical representations and meets current legal accessibility requirements.
- ii. Retention of historical data and ability to compare across years and support analysis.
- iii. Highly qualified proposals will have the ability to support the configuration and generation all SCO-prescribed Final County Budget Book schedules, including financing sources/uses schedules, fund balance schedules, debt schedules, position schedules, and special district schedules, exactly as described in the SCO County Budget Guide.
- iv. Export functionality to popular formats (digital accessibility compliant PDF, Excel, CSV), and compliant PDFs of final budget and capital improvement plan documents for submission to the Board of Supervisors and for public access.
- v. Compatibility with Asana, the County's project management software.

5. System Integration

- i. Full compatibility using flat files and/or application programming interfaces (APIs) with external systems: Tyler Enterprise ERP.
- ii. Automated quality control and reporting for data imports.
- iii. Ability to schedule repetitive processes.

6. Data Management

- i. Centralized database for budgetary and financial data.
- ii. Data validation and audit functions to ensure accuracy.

- iii. History tracking for budget changes and rationale for ease of auditing.
- iv. All County data entered, stored within, or generated by the system shall remain the property of the County of Marin.
- v. The solution shall provide authorized County users the ability to access and export County data without vendor intervention.
- vi. Audit Logging: The system shall maintain a record of user activity, including data changes, data exports, user access, and permission changes, and make this information available to authorized County administrators.
- vii. The system shall maintain versioning for recommended, adopted, and final budgets and shall provide full audit trails, including edits, imports, approvals, and changes affecting data or schedules.

7. Technical Standards

- i. Vendor shall provide a System that meets County of Marin performance, planning and infrastructure requirements, and shall furnish system architectural, sizing, and capacity planning recommendations sufficient to enable the System to operate at optimal performance throughout the term of the agreement. The County's Enterprise Architect provides Countywide leadership over enterprise architecture direction, long-term technology standards, and architecture governance for major initiatives, and reviews major projects and procurements for alignment as part of County technology governance. Vendor shall cooperate with the County's architecture review process and shall design and deliver the System consistent with County architecture standards and guardrails, including requirements for interoperability and data sharing across departments, reduction of duplicative systems, and security, privacy, accessibility, and resilience by design.
- ii. IT Service Management. Vendor shall manage the System and all supporting software and hardware environments under a consistent IT lifecycle service management framework that reflects industry standards and best practices for both on-premises and software-as-a-service (SaaS) delivery.
- iii. Data integration capabilities via APIs and flat files with internal systems.
- iv. Compliance with industry standards for security, including ISO 27001.
- v. User controlled updates and patching to maintain system reliability.

8. Artificial Intelligence / Business Intelligence

- i. Writing and editing assistance.
- ii. Automated summarization and visualization of budget changes.
- iii. Automated insights and prompts for updates.

9. Capital Improvement Plan (CIP) Software System Additional Requirements

- i. Capital project management and implementation planning, including a detailed schedule, roles, responsibilities, milestones, and deliverables.
- ii. A centralized repository for capital project information, including project descriptions, departments, locations, phases, schedules, budgets, funding sources, status updates, risks, milestones, attachments, and contacts. The system should support project updates over time and maintain a record of relevant changes.
- iii. System configuration to support the County's capital planning, budgeting, project tracking, review, and reporting processes.
- iv. Integration with Tyler Enterprise ERP for relevant financial data, including project budgets, expenditures, encumbrances, account codes, funding sources, project identifiers, and other mutually agreed-upon data elements.
- v. Tools for departments to enter, update, submit, and maintain capital project information.
- vi. Workflow capabilities for review, approval, prioritization, and change tracking.
- vii. Reporting and dashboard capabilities for staff, department leadership, executive management, and Board review.
- viii. Functionality to generate CIP planning documents, including project pages, summary tables, funding summaries, schedules, charts, maps, and narrative sections.
- ix. Data migration or import support for existing capital project information, as needed. E.g., **CIP Intake Form**: the ability to provide configurable CIP intake forms for departments to submit new CIP projects, project modifications, and funding requests.
- x. User training for system administrators, department users, finance staff, project managers, and report/document users.
- xi. Documentation, knowledge transfer, and post-implementation support.
- xii. Ongoing maintenance, system updates, technical support, and customer service.

B. Service Requirements

1. Implementation Services

- i. Full lifecycle project management for system implementation.
- ii. Configuration of the system to meet the County's specific workflows and reporting needs.
- iii. Data migration from existing systems with validation processes.
- iv. End-user training sessions for administrators, staff, and management personnel.

2. Post-implementation support for at least 12 months. Ongoing Support and Maintenance.

- i. Help Desk support with timely response and resolution times.
- ii. Regular system updates and maintenance services.
- iii. Dedicated account manager for ongoing relationship management and issue escalation.
- iv. Clear, collaborative platform documentation/knowledge base.

3. Performance Monitoring
 - i. Regular performance evaluations and feedback sessions with team of County budgeting and financial planning subject matter experts (SMEs).
 - ii. Quarterly reports on system usage, incidents, and recommendations for improvements.
4. Compliance and Risk Management
 - i. Documented procedures for data security and privacy compliance.
 - ii. Regular audits to ensure compliance with applicable standards.
 - iii. County data shall not be sold, shared, or used for purposes other than providing contracted services to the County.

C. Delivery Requirements

1. Project Timeline
 - i. A detailed Gantt chart outlining the proposed timeframe for implementation.
 - ii. Milestones for phases of the project (e.g., initiation, configuration, deployment, testing).
 - iii. Indicate turnaround times for data migration, user training, and system testing.
 - iv. Vendor provided Project Manager to parter with County Project Manager to streamline implementation.
2. Documentation
 - i. Comprehensive, collaborative, and digitally compliant user manuals for end-users and administrators; ideally including generative AI chatbot Q&A support.
 - ii. Technical documentation outlining system architecture and configuration.
 - iii. Regular updates on project status communicated to relevant County personnel.
3. Testing and Quality Assurance
 - i. Detailed plan for user acceptance testing (UAT).
 - ii. Quality assurance processes prior to the system going live.
 - iii. Proof of digital accessibility conformance to WCAG 2.2 AA or most recent version.
 - iv. Identify and address any issues or bugs prior to full deployment.
 - v. Development of robust regression testing scripts and plan for post implementation updates.
4. Support During Transition
 - i. Onsite support during the final deployment phase.
 - ii. Enhanced assistance with troubleshooting any post-launch issues.

D. Performance Measures

1. Implementation
 - i. The proposer meets or exceeds the implementation timeline including delivering agreed upon key milestones and meets all deadlines for each phase of platform implementation.
 - ii. Feedback collected during implementation phase is addressed in a timely manner.
 - iii. County and Implementor agree on final go-live acceptance criteria with a document formal go-no go matrix.
2. Data Migration
 - i. The proposer successfully completes data migration, including accuracy, completeness, and timeliness of data transfer from the previous budget system within the agreed upon timelines.
3. Data Security and Compliance
 - i. Meets measures related to data protection, compliance with regulations (e.g., California Consumer Privacy Act (CCPA), Health Insurance Portability and Accountability Act (HIPAA), and regular security audits.
4. Onboarding
 - i. The proposer successfully completes Administrator and user onboarding processes, including training sessions, documentation delivery, and user setup, within the agreed upon timelines.
5. Support
 - i. The level of support available immediately after implementation, including duration and response times for issues that arise during the transition are explicitly stated and met.
 - ii. Expected response times for different levels of support requests (e.g., critical, high, medium, low) are within the stated durations.
6. Service Level Agreements (SLAs)
7. Uptime guarantees, response times for support requests, and resolution times for incidents are within stated expectations.
8. Incident Reporting
 - i. Requirements for reporting incidents, including timelines for notification and follow-up have been met.
9. Regular Reviews
 - i. Periodic performance reviews to assess compliance with the agreed-upon metrics and make adjustments as necessary are regularly scheduled and held.
 - ii. Digital Accessibility Conformance Report (ACR) / audit after major upgrades to document accessibility conformance.

10. Penalties and Remedies

- i. Penalties for failing to meet performance measures, such as service credits or the right to terminate the contract are specified

E. Proposed Budget Book Publication Requirements

1. General Requirements

- i. Adherence to County Branding ([See FY 2026-28 Proposed Budget Book Document](#)).
- ii. Ability to automatically generate complete annual budget book sections such as budget and FTE summaries.
- iii. Ability for County staff to edit text, charts, and tables before final publication.

2. Required Sections

- i. Work Plan and Progress/Timeline
- ii. Countywide budget summary
- iii. Fund summaries
- iv. Department narratives
- v. Program descriptions
- vi. Position/Staffing summaries
- vii. Financial schedules (revenue, expenditures, etc.)
- viii. Performance metrics (if applicable)
- ix. GFOA-compliant formatting

3. Publication Requirements

- i. Online/web-based and printable versions
- ii. Meets accessibility standards

F. Final Budget Book Publication Requirements

1. General Requirements

- i. Adherence to County Branding ([See FY 2025-26 Final Budget Book Document](#)).
- ii. Ability to automatically generate complete annual budget book sections such as budget and FTE summaries.
- iii. Ability for County staff to edit text, charts, and tables before final publication.

- 2. The final budget book must be produced in full compliance with State Controller's Office (SCO) County Budget Book requirements, including all legally mandated schedules, formatting standards, statutory structure, and required metadata. The system must ensure that SCO-required schedules and narratives are generated in a manner consistent with the SCO County Budget Guide. Required Sections:

- i. Funding Charts
- ii. SCO schedules 1-15
- iii. Position classification schedules including salary rates and all Board approved positions as required by SCO

2. Publication Requirements

- iv. Online/web based and printable versions.

- v. The solution shall support tools for tracking all SCO statutory budget deadlines (Gov. Code §§ 29040–29088), including alerts and checklists, and shall package all required SCO budget filing materials for the County’s December 1 submission.

G. CIP Book Publication Requirements

1. The system shall support preparation of a professional Capital Improvement Program (CIP) planning document for review by the Board of Supervisors. Desired functionality includes configurable project pages, project summaries, financial tables, funding summaries, schedules, maps, charts, department sections, narrative text, and publication-ready formatting. The County seeks to reduce the manual effort required to assemble, format, update, and publish the CIP document. (See [June Proposed Capital Improvement Plan FY 2027-31](#) for reference.)
2. CIP Document Production
 - i. Produce a professional, Board-ready Capital Improvement Plan document suitable for public review, website posting, and Board of Supervisors consideration.
3. Project Summary Pages
 - i. Create standardized project pages with project description, department, location, cost, funding source, schedule, status, and project justification. Include the ability to insert photos and other visual elements so project sheets look polished, engaging, and accessible to the community.
4. Multi-Year Financial Tables
 - i. Generate tables showing capital expenditures by fiscal year, department, project category, fund, and funding source.
5. Financial System Alignment
 - i. Support reconciliation with the County’s financial system, including project numbers, budgets, expenditures, encumbrances, and funding sources.
6. Public-Facing Reporting
 - i. Provide clear summaries, charts, and tables that are understandable to both technical and non-technical audiences.
7. Document Design
 - i. Use County branding and consistent formatting, with export options for accessible PDF and editable source files.
8. Review Workflow
 - i. Allow departments to review, update, and approve project information before final publication.
9. Annual Updates
 - i. Provide reusable templates and workflows so the County can update the CIP document each budget cycle.

H. Digital Accessibility

1. For all publications listed above, Contractor shall ensure that all digital content and deliverables shall meet the World Wide Web Consortium’s (W3C) Web Content Accessibility Guidelines (WCAG), Version 2.2,

level AA or most recent version, including any and all other applicable law regarding accessibility requirements. Contractor is responsible for addressing accessibility problems in any implementation, configuration, or documentation delivered or performed by contractor, and in any software, documents, videos, and/or trainings given and published by Contractor and delivered under this contract. Applicable laws include but are not limited to Americans with Disabilities Act (ADA), 21st Century Communications and Video Accessibility Act (CVAA), and California Government Code Sections 7405 and 11135.

2. Contractor will engage in good faith with open and effective communication with County of Marin to solve and address accessibility issues. County of Marin will collaborate with contractor around accessibility, understanding that it is the contractor's responsibility to conduct accessibility testing, provide proof of compliance, and create accessible deliverables.

End of Project Information and Scope of Work

II. Instructions

A. Declaration of Interest

All interested respondents are requested to submit a written Declaration of Interest by **Thursday, September 10, 2026**. Please email Sana Danish at sana.danish@marincounty.gov.

The subject line of the email shall be: **RFP 2907 County Budget Software System – Declaration of Interest from [Company Name]**

The body of the email simply needs to indicate in writing that the interested party intends to submit a final proposal in response to the RFP and must provide contact information for the interested party. Submitting a Declaration of Interest is non-binding and does not compel an interested party to submit a final proposal.

B. Solicitation Questions

The Proposer must carefully examine the specifications, terms and conditions provided in the Request for Proposal and become fully informed as to the requirements set forth therein. If any party planning to submit a proposal discovers any ambiguity, conflict, discrepancy, omission or error in the proposal, has any questions in relationship to the “Scope of Work”, or any other related matters, shall submit their questions and/or request clarification or modification of the document(s) in writing via email.

All questions must be emailed and received by **Thursday, September 10, 2026**, no later than 5:00 p.m. PT. Questions asked after this date and time will not be considered. All questions shall be submitted to Jorge Molina via email at Jorge.Molina@marincounty.gov. Phone calls and faxed questions will not be accepted.

The subject line of the email shall be: **RFP 2907 County Budget Software System – Solicitation Question**

Answers to all written questions concerning this solicitation will be posted on the [County of Marin Contracting Opportunities website](#) by 5:00 p.m. PT on **Friday, September 18**. It is the responsibility of all interested proposers to access the website(s) for this information.

C. Proposal Submittal Requirements

Submitted responses must include the form(s) provided with this solicitation package. All items shall be filled in and the signatures of all persons signing shall be written and printed in longhand. All proposals submitted must have a completed Offer form signed by a duly authorized officer of the proposing contractor. Proposals not submitted on the form(s) provided, unless otherwise specified, may not be considered by the County Administrator's Office.

One (1) Electronic PDF version of the proposal is due on **Wednesday, September 30, 2026**, no later than 5:00 p.m. PT. Completed proposals should be submitted to Jorge

Molina via email at Jorge.Molina@marincounty.gov. The subject line shall be: **RFP 2907 County Budget Software System – Submitted Proposal.**

Completed proposals should be submitted to Jorge Molina via email at Jorge.Molina@marincounty.gov. An acknowledgment email will be sent to confirm receipt of the proposal. If the proposer does not receive an email with "Received" confirmation within 24 hours of the submission deadline, it is the proposer's responsibility to follow up with Jorge Molina at Jorge.Molina@marincounty.gov. Failure to follow up or receive a confirmation email will result in the submission not being considered by Jorge Molina.

The proposal should be straightforward, concise and provide "layperson" explanations of technical terms that are used. Emphasis should be concentrated on conforming to the RFP instructions, responding to the RFP requirements, and on providing a complete and clear description of the offer. The proposal should contain the sections in the order indicated below, along with any additional information appropriate:

1. **Cover letter:** Provide a letter of introduction, no more than 2 pages in length. The cover letter should also include a profile and brief history of the firm.
2. **Listing of Personnel.** This section shall define the qualifications and the experience of the vendor, key personnel and staff assigned to the project. A designated primary contact for the duration of the contractual period should be identified.
3. **Statement of Qualifications and approach to Scope of Work.** This section shall briefly define the approach vendors will undertake to best serve the County's needs. There is no specific page limit for this section, but it should include:
 - i. Specific experience with County or municipal government implementations.
 - ii. Experience and success/major accomplishments in performing the type(s) of services outlined in the Scope of Work.
 - iii. Contractors shall fully describe any exceptions to the written requirements and/or scope of the project. Any exception taken shall be fully described to allow the County of Marin to evaluate its acceptance.
4. **References and clients.** Please provide references for similar work that your firm has provided within the last three (3) years. Include a detailed description of the services, the agency names, contact names and phone numbers, dates of services performed, and successful work completed. A current list of clients and clients over the past three years is also requested.
5. **Disclosure of any alleged significant prior or ongoing contract failures,** any civil or criminal litigation or investigation pending which involves the Proposer or a verification of no responsive incidents. Failure to comply with the terms of this provision may disqualify any proposal. The County of Marin reserves the right to reject any proposal based upon the Proposer's prior history with the County of Marin or with any other party, which documents, without limitation, unsatisfactory performance, significant failures to meet contract milestones or other contractual failures.

Once received, all original and/or copies of the proposal become property of the County of Marin and will not be returned. Proposals will be considered late if not received by the above due date and time and will be rejected.

All costs of preparation of proposals including travel for any interviews scheduled shall be borne by the respondents.

The County of Marin reserves the right to reject any and all proposals and to elect not to enter into any contract for the services described in the scope of work. The County reserves the right to make multiple awards of this proposal. The County of Marin also reserves the right to request additional information not included in this RFP from any of the respondents.

D. Solicitation Documents to be Returned with Submittal

In addition to the documents described in the Proposal Submittal Requirements section above, the following forms must be completed and submitted with the Proposal by the Submittal Deadline.

Submittal Document 1: Offer (page 31)

Submittal Document 2: Schedule of Proposed Fees (page 32)

Submittal Document 3: Debarment Suspension Certification (page 34)

Submittal Document 4: Non-collusion Declaration (page 35)

Submittal Document 5: Levine Act Disclosure Statement (page 36)

Submittal Document 6: Exceptions to the Scope of Work (page 37)

Submittal Document 7 – if applicable: Local Business Preference Certification (page 38)

Submittal Document 8 – if applicable: Workforce Preference Certification (page 39)

If selected, successful Proposer shall be required to furnish the following:

Certificate of Liability Insurance

Additional Insured Endorsement naming “County of Marin” as additional insured

W-9 Document

Any other requested documentation related to this solicitation and/or Vendor Registration

E. Contract Term

The initial contract term is subject to negotiation. The County reserves the right to extend the contract for additional years in two-year increments, by mutual consent of County and Contractor.

F. Minimum Qualifications/Experience Requirement

Proposers are required to have a minimum of five (5) years* of experience in commercial or government accounts of the same size and scope as described herein. Any proposer who cannot provide verifiable references for this minimum experience requirement may be considered non-responsive.

*Personal, professional experience may be substituted on a year-for-year basis.

G. Timeline of Events

The County of Marin will make all attempts to adhere to the following timeline.

Tuesday, August 18, 2026	Request for Proposal released
Thursday, September 10, 2026	Declaration of Interest due Deadline to submit questions by 5:00 p.m. PT
Friday, September 18, 2026	Responses to questions released
Wednesday, September 30, 2026	Submitted Proposals due by 5:00 p.m. PT
Thursday, October 1 - Wednesday, October 21, 2026 (Tentative)	County review period: vendor presentations and demonstrations are tentatively planned for the weeks of October 19 or October 26 (interviews may take place virtually).
Week of Monday, November 2, 2026 (Tentative)	Identification of apparent winner and planned contract award date

H. Informed Proposers / Examination of Documents

Before submitting a proposal, proposers must fully inform themselves of the conditions, requirements, and specifications of the work or materials to be furnished. Failure to do so will be at the proposer's own risk. It is the responsibility of the proposer to carefully and thoroughly examine and be familiar with legal and procedural documents, general conditions, all forms, specifications, addenda (if any), herein referred to as contract documents. Contractor shall satisfy themselves as to the character, quantity, and quality of work to be performed and materials, labor, supervision, equipment and appurtenances necessary to perform the work as specified by the contract documents. The failure or neglect of the contractor to examine the documents shall in no way relieve them from any obligations with respect to the solicitation or contract. The submission of a proposal shall constitute an acknowledgment upon which the County of Marin may rely that the contractor has thoroughly examined and is familiar with the contract documents. No claim will be allowed for additional compensation that is based upon a lack of knowledge of any solicitation document.

I. Verbal Agreement or Conversation with County Officials

No prior, current, or post-award verbal conversations or agreements with any officer, agent, or employee of the County or any other person or entity shall affect or modify any terms or obligations of this RFP or any agreement resulting from this process.

Except for the above named, potential respondents should not contact other Marin County officials or staff regarding any aspect of this RFP. If such contact is made, the County reserves the right to reject the proposal.

J. General Conditions

The issuance of this solicitation constitutes only an invitation to present responses. The County reserves the right, at its sole discretion, to determine whether or not any aspect of the response satisfactorily meets the criteria established in the solicitation. The County reserves the right to seek additional information and/or clarification from the respondent, the right to confer with any respondent submitting a response and the right to reject any or all responses with or without cause. The County reserves the right to reject any and all responses for failure to meet the requirements contained herein, to waive any technicalities and to select the responses, which, in the County's sole judgment, best meets the requirement of the project. In the event that the solicitation is withdrawn by the County for any reason, the County shall have no liability to any respondent for any costs or expense incurred with the preparation of a response to this solicitation or related work. The County reserves the right, at its sole discretion, to waive any irregularities or informality.

An example of the County of Marin Professional Services Agreement is attached to this solicitation. By submitting a response without exceptions, the contracting firm accepts all terms and conditions contained in the Sample Professional Services Agreement attached. Additional terms and conditions may be required and may be negotiated after award.

*****End of Instructions*****

III. Award Evaluation and General Procurement Provisions

The provisions in this section, with the exception to the Evaluation Criteria and Invoicing address, cannot be altered without prior approval by County Counsel and Procurement.

A. Responsible Parties

Representing the County of Marin in all matters regarding the submission of this solicitation package shall be Sana Danish, Budget and Management Analyst, sana.danish@marincounty.gov.

All inquiries shall be directed to the designated County staff person as shown. Failure to comply with this request may be considered cause for disqualification of your proposal.

B. Award of Contract

Award of proposal, if awarded, will be made to the Proposer offering the most advantageous proposal after consideration of all Evaluation Criteria set forth below. The criteria are not listed in order of preferences. An Evaluation Committee will be established by the County of Marin. The Committee will evaluate all proposals received in accordance with the Evaluation Criteria. The County of Marin reserves the right to establish weight factors that will be applied to the criteria depending upon order of importance. Evaluation scores will not be released until after award of proposal. The County of Marin shall not be obligated to accept the lowest priced proposal but will make an award in the best interests of the County after all factors have been evaluated.

Receipt of the official Contract shall indicate award of the proposal. Award of proposal shall be made by the County of Marin to the responsible Proposer who meets the provisions and specifications of this proposal after consideration of all evaluation criteria to provide the services as described in this request. The County reserves the right to make a multiple award of this proposal.

C. Award Evaluation Criteria

The Evaluation Criteria that will be used to evaluate all received proposals is listed in this RFP.

A Selection Committee will interview and evaluate each submission and determine which individuals, firms, corporations, organizations, or teams will be invited to enter into a Contract. The Selection committee may include an Analyst, an Assistant County Executive, Department staff or Directors, labor partners or other County representatives. The Selection Committee will review and make the final selection after review of materials and interviews with respondents. **Interviews may take place virtually.** Additionally, the review committee will determine whether respondents' existing client list present a conflict to the County's needs and Scope of Work.

The Selection Committee may also contact and evaluate the respondent's references; contact any respondent to clarify any response; contact any current users of a proposer's services; solicit information from any available source concerning any aspect of a proposal; and/or seek and review any other information deemed pertinent to the evaluation process. The Selection Committee is not obligated to accept the lowest priced

proposal but shall make an award in the best interest of the County of Marin, reject any and all proposals, and to waive any informalities and minor irregularities in the proposals.

Discussions/interviews may, at the County of Marin's sole option, be conducted with responsible Proposers who submit proposals determined to be reasonably susceptible of being selected for an award. Discussions/interviews may be for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and written revision of proposals. Revisions may be permitted after submissions and before award for obtaining best and final proposals. In conducting discussions/interviews, the County of Marin will not disclose information derived from proposals submitted by competing Proposers.

Once a contractor has been selected, the Office of the County Executive will review and refine the specific scope of the study with the contractor.

Note: The Proposer's main or lead contact for the County (Principal and key support staff) must present in any subsequent discussions/interviews during the Award Evaluation process.

Evaluation Criteria	Percent
Applicant Qualifications: - Demonstrated success implementing similar systems for comparable counties/municipalities - Proven integration experience with Tyler Enterprise ERP - Relevant experience of proposed team and project leadership - Quality and relevance of client references - Evidence of long-term product stability and support	25%
Technical & Implementation Approach - Clear understanding of County needs and Scope of Work - Quality and feasibility of implementation plan, timeline, staffing, and risk mitigation - Demonstrated ability to integrate with County systems (Tyler Enterprise ERP, Data Warehouse, etc.) - Documented process and evidence of product compliance with WCAG 2.2 AA and accessibility laws	25%
Vendor Demonstrations - Demonstrated ability to perform required workflows end-to-end - Usability (navigation, workflow clarity, reporting) - Actual system functionality vs. conceptual roadmap - Clarity and responsiveness during Q&A	35%
Pricing	15%
Total	100%

The County may consider other criteria that it deems relevant. The Selection Committee is free to make recommendations it may deem to be in the best interest of the County.

D. Preferences

Whenever the County of Marin acquires services or supplies by purchase order and/or contract, the Purchasing Agent, in evaluating the price or proposal, shall award preferences based upon the following preferences. In no case shall the total of all preferences which a bid is eligible exceed fifteen (15.0) percent.

1. Local Business Preference - In accordance with County of Marin Code 3.10 there shall be a five (5.0) percent preference on the price submitted by a local county business.
2. Workforce Development Preference – In accordance with County of Marin Code 2.50.070 Ordinance # 3435 there shall be a five (5.0) percent preference to contractors that can certify that at least 50 percent of the workforce under the service contract will be Marin County Residents.

This section shall not apply to transactions in which the allowance of these preferences is otherwise prohibited by state or federal statutes or regulation.

E. Supplier Performance Management Program (SPMP)

The Supplier Performance Management Program may be used to evaluate and assess contractor performance. This program may include but is not limited to: scheduled contract review, scorecards to measure performance on contract specific metrics, and periodic meetings to review performance and address any corrective action that may need to be taken. The intent is to be mutually beneficial, not only to ensure the supplier/contractor is meeting our expectations, but that the County is communicating our expectations to the supplier/contractor.

F. Addenda

Any changes, additions, deletions or clarifications to this proposal package shall be made by written addendum, issued by the County of Marin. Addenda will be sent to all known entities in receipt of the solicitation and shall be incorporated in the proposal. The proposer shall sign and date the addendum and submit with their response to the solicitation.

Addenda issued within five (5) calendar days of the proposal opening date/time shall be cause for extension of the opening date, if so determined by the Purchasing Agent, in order to allow prospective Proposers sufficient time to prepare their proposals.

G. Change Orders

The County of Marin may at any time, without notice to any sureties, make any change in the work specified in the resulting Contract by issuing a change order, including but

not limited to changes 1) in the terms and conditions of the Contract and 2) in the written specifications.

No order, statement or conduct, written or oral, shall be treated as a change order unless in writing and signed by both parties.

H. Invoicing and Payment

Payment by the County of Marin to vendor shall be made in full, per invoice within 30 calendar days after receipt of a correct invoice. Invoices shall be made per division. Invoices shall be mailed through the postal service. Purchase Orders are required for each order placed and invoices should reference the associated purchase order.

Depending on originating charges vendor shall submit an invoice only after services have been rendered to the following address:

Office of the County Executive
Attn: Sana Danish
3501 Civic Center Drive, Suite 325
San Rafael, CA 94903
or via email at sana.danish@marincounty.gov

I. Assignment and Subcontracting

The proposer shall have no right, authority or power to sell, mortgage or assign the resulting contract and/or purchase order or any interest herein, or any right, power or authority to allow or permit any other person or persons or organizations to have any interest in or use any part of the rights or obligations granted hereunder for any purpose whatsoever without the prior written consent of the County of Marin. Neither the contract and/or purchase order nor any interest created thereby shall pass by operation of law to any trustee or receiver in bankruptcy or to any other receiver or assignee for the benefit of creditors or any claim hereunder to any other party or parties, except as expressly authorized by the County of Marin.

J. Force Majeure

Time extension for delay may be allowed for the Proposer by the County of Marin for any delay in the completion/delivery of specified items which arises from unforeseeable causes beyond the control of the proposer and without fault or negligence of the proposer, including but not restricted to such causes as the act or negligence of the County of Marin, stormy or inclement weather in which specified work cannot be done, strikes, boycotts, acts of God, acts of the public enemy, acts of government, fire, flood, epidemics, freight embargo, delays of suppliers which arise from unforeseeable causes beyond the control and without the fault or negligence of both the proposer and supplier.

K. Nondiscriminatory Employer

The County of Marin does not discriminate on the basis of race color, religion, creed, sex, age, marital status, national origin, mental or physical disability, political belief or affiliation, veteran status, sexual orientation, gender identity (including gender

expression), genetic information, and any other class of individuals protected from discrimination under state or federal law in any of its activities or operations. This includes, but is not limited to, hiring and firing of staff, selection of volunteers and vendors, and provision of services. We are committed to providing an inclusive and welcoming environment for all members of our staff, clients, volunteers, contractors, subcontractors, vendors and clients.

L. Fair Employment Provisions

The contractor awarded this proposal and doing the work herein specified shall not knowingly fail to hire or allow to be dismissed from employment thereon any persons because of race, color, sex, religion, national origin, or creed. The hiring of all labor for the work included in this contract shall be in accordance with applicable directives of the Department of Fair Employment and Housing of the State of California.

The contractor shall comply fully with Titles I and II of the Americans with Disabilities Act (ADA), Sections 508 and 504 of the 1973 Rehabilitation Act as amended in 1998 in that the contractor's hiring practices do not discriminate against disabled persons.

The contractor shall cooperate fully with the County and affiliated unions to promote and ensure the maximum employment of minorities and other protected group members with particular emphasis on residents of Marin County, in all phases and at all levels of the work. The contractor shall encourage maximum utilization of apprenticeship and other on-the-job training programs to achieve this goal.

Contractor and/or any permitted subcontractor shall not unlawfully harass nor discriminate against any individual based on race, religious creed, color, national origin, ancestry, medical condition, marital status, sex, sexual orientation, age or condition of disability. Contractor and/or any permitted subcontractor understands and agrees that Contractor and/or any permitted subcontractor is bound by and will comply with the nondiscrimination mandates of all Federal, State and local statutes, regulations and ordinances.

A County representative will be available to advise and assist in implementation of the foregoing.

The Contractor shall comply with any and all federal, state and local laws (including, but not limited to the County of Marin Nuclear Free Zone and Living Wage Ordinance) affecting the services provided by the contractor.

M. Cancellation of Contract

Without CAUSE, the County of Marin may cancel this contract at any time with thirty (30) days written notice to the supplier/contractor. **With** CAUSE, the County of Marin may cancel this contract at any time with five (5) days written notice to the Proposer. Cancellation for cause shall be at the discretion of the County of Marin and shall be, but is not limited to, failure to supply the materials, equipment or service specified within the time allowed or within the terms, conditions or provisions of this contract. The Successful Proposer may not cancel this contract without prior written consent of the County of Marin Purchasing Agent.

N. Termination for Default – Time Extension for Delay

If the proposer fails or refuses to prosecute the work, or any separable part thereof, so as to ensure that the items specified will not be completed and/or delivered within the time specified in the proposal documents and Purchase Order, the County of Marin, may, by written notice to the proposer, terminate its right to proceed with the work or such part of the work as to which there has been a delay at the County's option. The proposer and its sureties shall be liable to the County of Marin for liquidated damages, or if no liquidated damages are so provided, then for any damages to the County of Marin resulting from the proposer's failure or refusal to complete/deliver the items within the specified time.

O. Termination for Convenience

The County reserves the right to terminate the contract at any time, for the convenience of the County of Marin, without penalty or recourse, by giving written notice to the Contractor at least thirty (30) calendar days prior to the effective date of such termination. The Contractor shall be entitled to receive just and equitable compensation for services and/or supplies delivered to and accepted by the County pursuant to the contract prior to the effective date of termination. Termination compensation cannot exceed the monthly service fee, and the termination nullifies the remaining months of the contract.

1. Termination for lack of funding: The County reserves the right to terminate any contract in any user agency if said agency loses funding during the term of the contract.
2. Termination for non-performance: The County may terminate the contract in whole or in part if delivery or performance is repeatedly unsatisfactory. Unsatisfactory performance includes but is not limited to:
 - i. Repeated failure to respond within requested time-frame
 - ii. Failure to perform services when promised or expected
 - iii. Inability to reach Contractor contact; lack of customer service

P. Nuclear Free Zone

The County of Marin is a nuclear free zone in which work on nuclear weapons and/or the storage or transportation of weapons related components and nuclear material is prohibited or appropriately restricted. The County is prohibited or restricted from contracting for services or products with, or investing County funds in, any nuclear weapons proposer (Marin County Ordinance, Chapter 23.12 Nuclear-Free Zone).

<https://apps.marincounty.gov/BosBoardsCommissions/BoardPage.aspx?BrdId=56>

Q. Damages

The proposer shall be held responsible for damage to existing facilities/sites, or to completed new work, that may be caused by the proposer's work or workmen. Proposer shall properly repair damage or remove and replace damaged property as appropriate at the proposer's expense as required by the County of Marin.

R. Living Wage

This contract is subject to the County of Marin Living Wage Ordinance #3435 [(part), 2005]. The ordinance requires the payment of a living wage to all covered employees engaged in providing services pursuant to a service contract as defined in section 2.50.030 (F). Proposer specifically agrees that should the County of Marin investigate allegations of non-compliance with the Living Wage Ordinance, proposer shall make available for audits its books and records relating to the service contract, as well as the books and records of its subcontractors and proposer will make available employees in furtherance of its investigation. Misrepresentation during the procurement or contracting process in order to secure the contract will disqualify a contractor or subcontractor from further consideration in the procurement or contracting process. Failure to comply once a contract has been awarded will constitute a material breach of the contract and may result, among other things, in the suspension or termination of the affected contract opportunities for a period not to exceed three years. (Marin County Ordinance, Chapter 2.50 Living Wage)

[Living Wage Ordinance | Marin County](#)

S. Cooperative Agreement

Agreement may be used by other governmental agencies, school districts, and special districts upon mutual consent of both parties. The proposer shall provide firm fixed pricing for all items or services, as specified herein, and allow agencies to purchase said goods or services at any time during the effective period of the resulting County of Marin Contract and/or Purchase Order.

T. Joint Procurement

In accordance with 2 C.F.R §200.318(e) Intergovernmental agreements for procurement or use of common goods and services is encouraged by federal procurement guidelines. Joint procurement is a contracting method in which two or more agencies agree from the outset to use a single solicitation document and enter into a single contract for goods or services. The proposer understands in providing a response to this solicitation, that a single contract will be issued for the benefit of all agencies identified within the solicitation.

U. Independent Proposer

The proposer agrees and certifies that they or any of their agents, servants, or employees is not an agent or employee of the County of Marin. The proposer is an independent solely responsible for proposer's acts. The resulting Contract and/or Purchase Order shall not be construed as an agreement for employment with the County. The Non-Collusion Affidavit shall be signed and returned with the submitted proposal.

V. Non-Appropriation of Funds

The County of Marin warrants that it has funds available to remit payments on the resulting County Purchase Order at the time the purchase order is executed. Should appropriated funds during the term of the Purchase Order become unavailable for the

purpose of the Contract and/or Purchase Order, the County may cancel the agreement by providing the proposer with written notice. Such notice shall release both the County and proposer from all obligations under the Contract and/or Purchase Order, and proposer shall refund the County the balance of any advance payment made for orders of goods and/or services which are outstanding, or which have not been received by the County.

W. Compliance or Deviation to Specifications

Proposer hereby agrees that the material, equipment or services offered will meet all the requirements of the specifications in this solicitation unless deviations are clearly indicated in the proposer's response and listed as such under Exceptions to the Scope of Work.

X. Governing Laws

This Request for Proposal and the resulting purchase order and/or contract shall be governed by all applicable federal, state, and local laws, codes, ordinances, and regulations including, but not limited to, those promulgated by the Federal Emergency Management Agency (FEMA), Homeland Security, CAL-OSHA, FED-OSHA, Environmental Protection Agency (EPA), Equal Employment Opportunity Commission (EEOC), California Department of Fair Employment and Housing (DFEH), the California State Department of Health and Human Services (CalHHS) and the County of Marin Environmental Health Department, the Federal Migratory Bird Treaty Act of 1918, the California Department of Fish and Wildlife codes 3503, 3503.5, 3513, and Marin County Code 23.16.010 for Pacheco Pond Wildlife area. This contract shall be in accordance with the substantive and procedural laws of the State of California.

Y. Insurance

Successful proposer shall be required to furnish and maintain insurance as follows:

Commercial General Liability:

The Contractor shall maintain a commercial general liability insurance policy in the amount of \$1,000,000 (\$2,000,000 aggregate). The County shall be named as an additional insured on the commercial general liability policy.

Commercial Automobile Liability:

Where the services to be provided under this Contract involve or require the use of any type of vehicle by Contractor, Contractor shall provide comprehensive business or commercial automobile liability coverage, including non-owned and hired automobile liability, in the amount of \$1,000,000.00.

Workers' Compensation:

The Contractor acknowledges the State of California requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code. If Contractor has employees, a copy of the certificate evidencing such insurance, a letter of self-insurance, or a copy of the Certificate of Consent to Self-Insure shall be provided to County prior to commencement of work.

Z. Debarment and Suspension Certification

Title 49, Code of Federal Regulations, Part 29

The bidder, under penalty of perjury, certifies that, except as noted below, he/she or any other person associated therewith in the capacity of owner, partner, director, officer, and manager:

- is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency;
- has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past 3 years;
- does not have a proposed debarment pending; and
- has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

Note: Providing false information may result in criminal prosecution or administrative sanctions. The above certification is part of the Bid. Signing this bid on the signature portion thereof shall also constitute signature of the Certification.

AA. Conformity with Law and Safety

Vendor shall observe and comply with all applicable laws, ordinances, codes and regulations of governmental agencies, including Federal, State, Municipal and Local Governing Bodies having jurisdiction over the scope of services or any part hereof, including all provisions of the Occupation Safety and Health Act of 1979 and all amendments thereto, and applicable Federal, State and Local Government Safety Regulations. All services performed by Vendor must be in accordance with these laws, ordinances, codes and regulations. Vendor shall indemnify and save County harmless from any and all liability, fines, penalties and consequences arising from any non-compliance of violations of such laws, ordinances, codes and regulations.

Accidents: If a death, serious personal injury, or substantial property damage occurs in connection with the performance of this agreement, Vendor shall immediately notify the County by telephone. Vendor shall promptly submit to County a written report, in such form as may be required by County, of all accidents which occur in connection with this agreement. This report must include all of the following information:

- (1) Name and address of the injured or deceased person, and
- (2) Name and address of Proposer's subcontractor (if any), and
- (3) Name and address of Proposer's Liability Insurance Carrier, and
- (4) A detailed description of accident and whether any of County's equipment or material was involved.

BB. Attorney's Fees

If any action at law or inequity is brought to enforce or interrupt the provisions of this agreement, the prevailing party shall be entitled to reasonable attorney's fees in addition to any other relief to which it may be entitled.

CC. Proposer Agreement to Terms and Conditions

Submission of a signed proposal will be interpreted to mean Proposer has agreed to all the terms and conditions set forth in the pages of this solicitation.

DD. Right to Audit

County shall have the right of audit and inspection of the Vendor's business records at any time during the term of this agreement. Vendor shall have readily available all records related to the performance of the agreement and shall provide office space as may be required for County to audit these records.

EE. California Public Records Act (CPRA)

Applicants acknowledge and agree that the County is a public agency subject to the disclosure requirements of the California Public Records Act ("CPRA"). If Applicant's proprietary information is contained in documents or information submitted to the County, and Applicant claims that such information falls within one or more CPRA exemption, the Applicant must clearly mark such information "CONFIDENTIAL AND PROPRIETARY" and identify the specific lines containing such information.

In the event of a request for such information, County will make reasonable efforts to provide notice to Applicant prior to any disclosure. If Applicant contends that any documents are exempt from the CPRA and wishes to prevent disclosure, then Applicant is required to obtain a protective order, injunctive relief or other appropriate remedy from a court of law in Marin County before the County's deadline to respond to the CPRA request. If Applicant fails to obtain such remedy, County may disclose the requested information without penalty or liability.

Applicant further agrees that it shall defend, indemnify and hold County harmless against any claim, action or litigation (including but not limited to all judgments, costs, fees and attorneys' fees) that may result from denial by County of a CPRA request for information arising from any representation, or any action (or inaction) by the Applicant.

FF. Taxes

Successful Proposer shall pay all federal, state and local taxes, levies, duties and assessments of every nature due in connection with any work under the contract and shall indemnify and hold harmless the County of Marin from any liability on account of any and all such taxes, levies, duties, assessments and deductions.

GG. Tax, California Non-Resident Income and Franchise Tax Withholding

The California Franchise Tax Board through the California Revenue and Taxation Code (R&TC) Section 18662 and the related regulations requires the withholding of California income and franchise taxes from payment made to nonresident California vendors performing services in this state. A withholding of 7% (the 2011 rate which is applicable to change) of all service-related invoices will be withheld and remitted to the state; there is no required withholding on goods provided. In addition, there are higher applicable

rates that apply to nonresident foreign non-corporate partners, corporate partners and foreign bank (including financial institution partners).

End of Award Evaluation and General Procurement Provisions

IV. Submittal Document 1: Offer

In compliance with the solicitation, the undersigned offers and agrees, if this bid is accepted within sixty (60) calendar days from date of opening, to furnish any or all of the items upon which prices are quoted, at the price set opposite each item, delivered at the designated point within the time specified. Discounts will not be considered in the evaluation of any quotation, unless otherwise stated in this invitation.

The County of Marin is committed to developing and supporting diverse, equitable, and inclusive values within all aspects of its operations. By conducting business for or with the County, you are representing your commitment to rejecting inequities in employment, services, and practices by ensuring fair and equitable treatment for all.

REPRESENTATIONS AND CERTIFICATIONS

Proposer certifies the following

That they are a: _____ Certified Dealer/Vendor for the Items in this Bid

_____ Manufacturer of the Items in this Bid

Business is operated as: _____ an Individual

_____ a Partnership

_____ a Corporation

Incorporated in the State of _____

Company Name: _____

Company Address: _____

Company Phone: _____

Company Website: _____

Signature of person authorized to sign bid: x _____

Printed name: _____

Title: _____

Date: _____

Email address: _____

V. Submittal Document 2: Schedule of Proposed Fees

Schedule of Proposed Fees – Please include details on what deliverables will be provided

Total Costs by Year	Description / Deliverables	One-Time Implementation Costs	Recurring Annual Costs	Total Costs
Year 1				\$
Year 2				\$
Year 3				\$
Year 4				\$
Year 5				\$
Five-Year Total Cost of Ownership				\$

Optional/Additional Proposed Fees (Optional) – Please include details on what additional deliverables will be provided outside the Scope of Work. Upon evaluation of the proposal the County may elect to include additional deliverables.

Additional Tasks (#)	Description/Deliverables	Price
		\$
		\$
		\$
		\$
		\$
Total Annual Additional Costs		\$

VI. Submittal Document 3: Debarment and Suspension Certification

Title 49, Code of Federal Regulations, Part 29

The Contractor, under penalty of perjury, certifies that, except as noted below, he/she or any other person associated therewith in the capacity of owner, partner, director, officer, and manager:

- is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency;
- has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past 3 years;
- does not have a proposed debarment pending; and
- has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

If there are any exceptions to this certification, insert the exceptions in the following space.

Dated this _____ day of _____, 20 _____

By _____
Authorized Signature for Contractor

Printed Name & Title

VII. Submittal Document 4: Non-collusion Declaration

The undersigned declares:

I am the _____ of _____, the party making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on

_____ [date], at _____ [city],
_____ [state].”

(Amended by Stats. 2011, Ch. 432, Sec. 37. (SB 944) Effective January 1, 2012.)

Printed Name of Document Signer

Signature of Document Signer

VIII. Submittal Document 5: Levine Act Disclosure Statement & Form

LEVINE ACT DISCLOSURE STATEMENT & FORM

The Levine Act applies to all agencies whose members are directly elected by the voters. It precludes these elected officials from participating in or influencing a decision to issue a "license, permit, or other entitlement for use" if he or she receives any political contributions totaling more than \$250 in the 12 months before the pendency of the license, permit or other entitlement for use, and for 12 months following the final decision, from the person or company awarded the license, permit or use. The Levine Act defines the phrase "license, permit or other entitlements for use" to include "all contracts (other than competitively bid, labor, or personal employment contracts), and all franchises."

You must complete this form if you are a party, participant or agent that has contributed more than \$250 to a member of the Board of Supervisors, or to the Assessor, District Attorney, or Sheriff, within the 12 months prior to a proceeding involving a license, permit or other entitlement for use, as defined in Government Code section 84308, subd. (a). Agents to a party include an attorney, engineer, architect, or other representative, and are subject to the requirements of the Levine Act in the same manner as parties and participants.

Parties are solely responsible for completing this form accurately and should refer to Government Code section 84308, et seq. and to California Code of Regulations, Title 2, section 18438, et seq. If you are uncertain about whether you are required to report or combine a contribution, you should consult with an attorney. Submit separate forms for each elected County officer to whom a contribution was made.

Title or Short Description of Proceeding: _____

Name of County Officer that Received Contribution: _____

Name of Party to the Proceeding: _____

Name of Person/Entity that Made the Contribution: _____

Contribution Date: _____ Contribution Amount _____

By signing below, I certify that the statements made herein are true and correct and that, as the party or agent to a party, I represent I will comply with California Government Code section 84308. I also agree to disclose any contributions made to an elected County Official that participates in this proceeding.

Date

Signature of Party or Agent

Name of Party or Agent

IX. Submittal Document 6: Exceptions to the Scope of Work

EXCEPTIONS TO THE SCOPE OF WORK

Contractors shall fully describe any exceptions to the written requirements and/or scope, in the space provided below. Attach an additional sheet if more space is necessary. Any exception taken shall be fully described to allow the County of Marin to evaluate its acceptance.

Section or

Page number

Description of Exceptions

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

END OF EXCEPTIONS

X. Submittal Document 7: Local Business Preference Certification

**PLEASE DO NOT COMPLETE THIS FORM UNLESS YOU QUALIFY FOR THE
PREFERENCE**

Chapter 3.10 of the Marin County Code, Preference in Contracts and Purchases, allows a 5% preference on the price submitted to local businesses which Contract with or All respondents must certify they meet the definition of local business. Please initial one of the following definitions which apply to your business and describe below:

1. _____ **has its principal place of business in Marin County; or**

Describe: _____

2. _____ **has a business license issued in Marin County for a period of six months prior to any claim of preference; or**

Describe: _____

3. _____ **maintains an office or other facility in Marin in which not less than five persons are employed substantially full time.**

Describe: _____

Pursuant to Marin County Code, Chapter 3.10.40, any business which falsely claims a preference shall be ineligible to bid on county purchases or contracts for a period of one year from the date of discovery of the false certifications.

Upon request, vendor agrees to provide additional information to substantiate this certification.

Vendor certifies information provided is true and accurate under penalty of perjury.

Firm Name

Business Address City, State, Zip Code

Signature of Authorized Representative Contact Number

Title E-Mail Address

XI. Submittal Document 8: Workforce Preference Certification

PLEASE DO NOT COMPLETE THIS FORM UNLESS YOU QUALIFY FOR THE PREFERENCE

All respondents must certify and describe that their business employs at least 50% of the workforce under the service contract at the time of this solicitation are Marin County residents as defined below:

“Employee” means an individual who is permanently or temporarily employed by a county contractor or subcontractor performing direct services during any applicable pay period on work funded (in whole or in part) pursuant to a service contract as defined under this chapter. Direct services do not include activity not directly contracted for by the county; for example, if the contract is for providing “counseling,” then only those employees providing that counseling are affected. Employees that would not be affected in that scenario would include support staff to those counselors, staff who process payroll or bill for the counselor’s time, or staff who supervise or manage those counselors. In another example, if the contract is to provide janitorial services, only those employees providing the janitorial services in county facilities would be affected. Employees who order supplies or repair equipment used in the performance of those services would not be affected.

Employee does not include an individual who is: (1) A worker classified as a student trainee, or intern working through an approved state or academic program or working towards state licensure or a professional accreditation sanctioned by a public entity or recognized licensure agency; (2) nor does it include anyone, regardless of age, who is providing services to earn academic credit or as part of a formal government approved, time-specific training program (e.g., Marin conservation corps trainees); and (3) employee also does not include a person providing volunteer services.

Describe: _____

The Marin Workforce Bidders Preference Certification form must be completed and returned with your bid/proposal response if you are claiming the 5% bidding preference. Upon request, vendor agrees to provide additional information to substantiate this certification. Vendor certifies information provided is true and accurate under penalty of perjury.

Firm Name

Business Address

City, State, Zip Code

Signature of Authorized Representative

Contact Number

Title

E-Mail Address

XII. Submittal Document 9: Digital Accessibility Software Questionnaire

Instructions: Please answer questions about each product.

- 1. What is the product's name and version?**
- 2. Does your company have a digital accessibility policy statement? If so, please attach or provide a link.**
- 3. Who at your company is responsible for digital accessibility compliance? Please provide the name and contact information.**
- 4. Do you have a designated accessibility representative to address issues or questions and who provides oversight related to the accessibility of your product? If so, please provide the name and contact information.**
- 5. Do you have documentation of your product's conformance to WCAG 2.2, AA? e.g., current version of a VPAT/ACR or audit results. If so, please attach. If not, please explain.**
- 6. Describe how digital accessibility fits into your product's development lifecycle. If applicable, please include information about your mobile apps. Attach any documents as needed.**
- 7. Does your company have an accessibility road map? If so, please provide a general outline (goals, milestones). If not, are there plans and a timeline?**
- 8. Do your developers have experience coding for digital accessibility? If so, please explain. If not, are there plans? Please elaborate.**
- 9. Do users with disabilities test your product with assistive technology? If so, explain the process and identify the range of disabilities and assistive technologies used.**
- 10. If accessibility changes are needed to your web/mobile interfaces/apps, what guarantee can we have that these will be implemented to our satisfaction prior to go-live/going forward? What is the bug fix response time?**
- 11. In what ways do your digital training materials conform to the WCAG 2.2, AA? (e.g., captioning, color contrast, navigation with keyboard only, screen readers within various browsers combinations.) Please explain.**

XIII. Attachment 1: Sample Professional Services Contract

SEE SAMPLE BELOW

**COUNTY OF MARIN
PROFESSIONAL SERVICES CONTRACT
2025 - Revised**

THIS CONTRACT is made and entered into this _____ day of _____, 20_____, by and between the COUNTY OF MARIN, hereinafter referred to as "County" and _____, hereinafter referred to as "Contractor."

RECITALS:

WHEREAS, County desires to retain a person or firm to provide the following service: _____; and

WHEREAS, Contractor warrants that it is qualified and competent to render the aforesaid services;

NOW, THEREFORE, for and in consideration of the Contract made, and the payments to be made by County, the parties agree to the following:

1. SCOPE OF SERVICES:

Contractor agrees to provide all of the services described in **Exhibit A** attached hereto and by this reference made a part hereof.

2. FURNISHED SERVICES:

The County agrees to:

- A. Guarantee access to and make provisions for the Contractor to enter upon public and private lands as required to perform their work.
- B. Make available all pertinent data and records for review.
- C. Provide general bid and Contract forms and special provisions format when needed.

3. FEES AND PAYMENT SCHEDULE:

The fees and payment schedule for furnishing services under this Contract shall be based on the rate schedule which is attached hereto as **Exhibit B** and by this reference incorporated herein. Said fees shall remain in effect for the entire term of the Contract. Contractor shall provide County with his/her/its Federal Tax I.D. number prior to submitting the first invoice.

4. MAXIMUM COST TO COUNTY:

In no event will the cost to County for the services to be provided herein exceed the maximum sum of \$ _____ including direct non-salary expenses. As set forth in section 14 of this Contract, should the funding source for this Contract be reduced, Contractor agrees that this maximum cost to County may be amended by written notice from County to reflect that reduction.

5. TIME OF CONTRACT:

This Contract shall commence on _____, and shall terminate on _____. Certificate(s) of Insurance must be current on day Contract commences and if scheduled to lapse prior to termination date, must be automatically updated before final payment may be made to Contractor. The final invoice must be submitted within 30 days of completion of the stated scope of services.

6. INSURANCE:

Commercial General Liability:

The Contractor shall maintain a commercial general liability insurance policy in the amount of \$1,000,000 (\$2,000,000 aggregate). The County shall be named as an additional insured on the commercial general liability policy.

Commercial Automobile Liability:

Where the services to be provided under this Contract involve or require the use of any type of vehicle by Contractor, Contractor shall provide comprehensive business or commercial automobile liability coverage, including non-owned and hired automobile liability, in the amount of \$1,000,000.00.

Workers' Compensation:

The Contractor acknowledges the State of California requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code. If Contractor has employees, a copy of the certificate evidencing such insurance, a letter of self-insurance, or a copy of the Certificate of Consent to Self-Insure shall be provided to County prior to commencement of work.

Errors and Omissions, Professional Liability or Malpractice Insurance:

Contractor may be required to carry errors and omissions, professional liability or malpractice insurance.

All policies shall remain in force through the life of this Contract and shall be payable on a "per occurrence" basis unless County specifically consents to a "claims made" basis. The insurer shall supply County adequate proof of insurance and/or a certificate of insurance evidencing coverages and limits prior to commencement of work. Should any of the required insurance policies in this Contract be cancelled or non-renewed, it is the Contractor's duty to notify the County immediately upon receipt of the notice of cancellation or non-renewal.

If Contractor does not carry a required insurance coverage and/or does not meet the required limits, the coverage limits and deductibles shall be set forth on a waiver, **Exhibit C**, attached hereto.

Failure to provide and maintain the insurance required by this Contract will constitute a material breach of this Contract. In addition to any other available remedies, County may suspend payment to the Contractor for any services provided during any time that insurance was not in effect and until such time as the Contractor provides adequate evidence that Contractor has obtained the required coverage.

7. **ANTI DISCRIMINATION AND ANTI HARASSMENT:**

Contractor and/or any subcontractor shall not unlawfully discriminate against or harass any individual including, but not limited to, any employee or volunteer of the County of Marin based on race, color, religion, nationality, sex, sexual orientation, age or condition of disability. Contractor and/or any subcontractor understands and agrees that Contractor and/or any subcontractor is bound by and will comply with the anti discrimination and anti harassment mandates of all Federal, State and local statutes, regulations and ordinances including, but not limited to, County of Marin Personnel Management Regulation (PMR) 21.

8. **SUBCONTRACTING:**

The Contractor shall not subcontract nor assign any portion of the work required by this Contract without prior written approval of the County except for any subcontract work identified herein. If Contractor hires a subcontractor under this Contract, Contractor shall require subcontractor to provide and maintain insurance coverage(s) identical to what is required of Contractor under this Contract and shall require subcontractor to name Contractor and County of Marin as an additional insured under this Contract for general liability. It shall be Contractor's responsibility to collect and maintain current evidence of insurance provided by its subcontractors and shall forward to the County evidence of same.

9. **ASSIGNMENT:**

The rights, responsibilities and duties under this Contract are personal to the Contractor and may not be transferred or assigned without the express prior written consent of the County.

10. **LICENSING AND PERMITS:**

The Contractor shall maintain the appropriate licenses throughout the life of this Contract. Contractor shall also obtain any and all permits which might be required by the work to be performed herein.

11. BOOKS OF RECORD AND AUDIT PROVISION:

Contractor shall maintain on a current basis complete books and records relating to this Contract. Such records shall include, but not be limited to, documents supporting all bids, all income and all expenditures. The books and records shall be original entry books with a general ledger itemizing all debits and credits for the work on this Contract. In addition, Contractor shall maintain detailed payroll records including all subsistence, travel and field expenses, and canceled checks, receipts and invoices for all items. These documents and records shall be retained for at least five years from the completion of this Contract. Contractor will permit County to audit all books, accounts or records relating to this Contract or all books, accounts or records of any business entities controlled by Contractor who participated in this Contract in any way. Any audit may be conducted on Contractor's premises or, at County's option, Contractor shall provide all books and records within a maximum of fifteen (15) days upon receipt of written notice from County. Contractor shall refund any monies erroneously charged.

12. WORK PRODUCT/PRE-EXISTING WORK PRODUCT OF CONTRACTOR:

Any and all work product resulting from this Contract is commissioned by the County of Marin as a work for hire. The County of Marin shall be considered, for all purposes, the author of the work product and shall have all rights of authorship to the work, including, but not limited to, the exclusive right to use, publish, reproduce, copy and make derivative use of, the work product or otherwise grant others limited rights to use the work product.

To the extent Contractor incorporates into the work product any pre-existing work product owned by Contractor, Contractor hereby acknowledges and agrees that ownership of such work product shall be transferred to the County of Marin.

13. TERMINATION:

- A. If the Contractor fails to provide in any manner the services required under this Contract or otherwise fails to comply with the terms of this Contract or violates any ordinance, regulation or other law which applies to its performance hereunder, the County may terminate this Contract by giving five (5) calendar days written notice to the party involved.
- B. The Contractor shall be excused its failure to perform services herein if such services are prevented by acts of God, strikes, labor disputes or other forces over which the Contractor has no control.
- C. Either party hereto may terminate this Contract for any reason by giving thirty (30) calendar days written notice to the other parties. Notice of termination shall be by written notice to the other parties and be sent by registered mail.
- D. In the event of termination not the fault of the Contractor, the Contractor shall be paid for services performed to the date of termination in accordance with the terms of this Contract so long as proof of required insurance is provided for the periods covered in the Contract or Amendment(s).

14. APPROPRIATIONS:

The County's performance and obligation to pay under this Contract is contingent upon an annual appropriation by the Marin County Board of Supervisors, the State of California or other third party. Should the funds not be appropriated County may terminate this Contract with respect to those payments for which such funds are not appropriated. County will give Contractor thirty (30) days' written notice of such termination. All obligations of County to make payments after the termination date will cease.

Where the funding source for this Contract is contingent upon an annual appropriation or grant from the Marin County Board of Supervisors, the State of California or other third party, County's performance and obligation to pay under this Contract is limited by the availability of those funds. Should the funding source for this Contract be eliminated or reduced, upon written notice to Contractor, County may reduce the Maximum Cost to County identified in section 4 to reflect that elimination or reduction.

15. RELATIONSHIP BETWEEN THE PARTIES:

It is expressly understood that in the performance of the services herein, the Contractor, and the agents and employees thereof, shall act in an independent capacity and as an independent Contractor and not as officers, employees or agents of the County. Contractor shall be solely responsible to pay all required taxes, including but not limited to, all withholding social security, and workers' compensation.

16. AMENDMENT:

This Contract may be amended or modified only by written Contract of all parties.

17. ASSIGNMENT OF PERSONNEL:

The Contractor shall not substitute any personnel for those specifically named in its proposal unless personnel with substantially equal or better qualifications and experience are provided, acceptable to County, as is evidenced in writing.

18. JURISDICTION AND VENUE:

This Contract shall be construed in accordance with the laws of the State of California and the parties hereto agree that venue shall be in Marin County, California.

19. INDEMNIFICATION:

Contractor agrees to indemnify, defend, and hold County, its employees, officers, and agents, harmless from any and all liabilities including, but not limited to, litigation costs and attorney's fees arising from any and all claims and losses to anyone who may be injured or damaged by reason of Contractor's negligence, recklessness or willful misconduct in the performance of this Contract.

20. DIGITAL ACCESSIBILITY:

Contractor shall ensure that all digital content and deliverables shall meet the World Wide Web Consortium's (W3C) Web Content Accessibility Guidelines (WCAG), Version 2.2, level AA or most recent version, including any and all other applicable law regarding accessibility requirements. Contractor is responsible for addressing accessibility problems in any implementation, configuration, or documentation delivered or performed by Contractor, and in any software, documents, videos, and/or trainings given and published by Contractor and delivered under this contract. Applicable laws include but are not limited to Americans with Disabilities Act (ADA), 21st Century Communications and Video Accessibility Act (CVAA), and California Government Code Sections 7405 and 11135.

Contractor will engage in good faith with open and effective communication with County of Marin to solve and address accessibility issues. County of Marin will collaborate with Contractor around accessibility, understanding that it is the Contractor's responsibility to conduct accessibility testing, provide proof of compliance, and create accessible deliverables.

21. COMPLIANCE WITH APPLICABLE LAWS:

The Contractor shall comply with any and all Federal, State and local laws and resolutions: including, but not limited to the County of Marin Nuclear Free Zone, Living Wage Ordinance, and Board of Supervisors Resolution #2005-97 prohibiting the off-shoring of professional services involving employee/retiree medical and financial data affecting services covered by this Contract. Copies of any of the above-referenced local laws and resolutions may be secured from the Contract Manager referenced in section 21. In addition, the following NOTICES may apply:

- 1. Pursuant to California Franchise Tax Board regulations, County will automatically withhold 7% from all payments made to vendors who are non-residents of California.**
- 2. Contractor agrees to meet all applicable program access, digital access and physical accessibility requirements under State and Federal laws as may apply to services, programs or activities for the benefit of the public.**

3. For Contracts involving any State or Federal grant funds, Exhibit D must be attached. Exhibit D shall consist of the printout results obtained by search of the System for Award Management at www.sam.gov.

Exhibit D - Debarment Certification

By signing and submitting this Contract, the Contractor is agreeing to abide by the debarment requirements as set out below.

- The certification in this clause is a material representation of fact relied upon by County.
- The Contractor shall provide immediate written notice to County if at any time the Contractor learns that its certification was erroneous or has become erroneous by reason of changed circumstances.
- Contractor certifies that none of its principals, affiliates, agents, representatives or contractors are excluded, disqualified or ineligible for the award of contracts by any Federal agency and Contractor further certifies to the best of its knowledge and belief, that it and its principals:
 - Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal Department or Agency;
 - Have not been convicted within the preceding three-years of any of the offenses listed in 2 CFR 180.800(a) or had a civil judgment rendered against it for one of those offenses within that time period;
 - Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or Local) with commission of any of the offenses listed in 2 CFR 180.800(a);
 - Have not had one or more public transactions (Federal, State, or Local) terminated within the preceding three-years for cause or default.
- The Contractor agrees by signing this Contract that it will not knowingly enter into any subcontract or covered transaction with a person who is proposed for debarment, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction.
- Any subcontractor will provide a debarment certification that includes the debarment clause as noted in preceding bullets above, without modification.

22. NOTICES:

This Contract shall be managed and administered on County's behalf by the Department Contract Manager named below. All invoices shall be submitted and approved by this Department and all notices shall be given to County at the following location:

Contract Manager: _____

Dept./Location: _____

Telephone No.: _____

Notices shall be given to Contractor at the following address:

Contractor: _____

Address: _____

Telephone No.: _____

23. ACKNOWLEDGEMENT OF EXHIBITS

☐ **Check applicable Exhibits**

**CONTRACTOR'S
INITIALS**

EXHIBIT A.

EXHIBIT B.

EXHIBIT C.

☐	Scope of Services	
☐	Fees and Payment	
☐	Insurance Reduction/Waiver	

EXHIBIT D.
EXHIBIT E.
EXHIBIT F.

☐	Contractor's Debarment Certification	
☐	Subcontractor's Debarment Certification	
☐	Federal Provisions Exhibit / Attachment 1	

IN WITNESS WHEREOF, the parties have executed this Contract on the date first above written.

CONTRACTOR:	APPROVED BY	COUNTY OF MARIN:
By: _____		
Name: _____		
Title: _____	By: _____	

=====

COUNTY COUNSEL REVIEW AND APPROVAL *(required if template content has been modified)*

County Counsel: _____ Date: _____

EXHIBIT "A"

SCOPE OF SERVICES (required)

SAMPLE

EXHIBIT "B"
FEES AND PAYMENT SCHEDULE (required)

COUNTY shall pay CONTRACTOR as follows:

- (1) BASE CONTRACT FEE. COUNTY shall pay CONTRACTOR a contract fee of _____ per month not to exceed _____ during the term of the contract. CONTRACTOR shall submit requests for payment via invoice net 30 following provision of services.
- (2) MILEAGE. COUNTY shall not pay CONTRACTOR for travel by private, leased or hired vehicle as required by this Contract.
- (3) TRAVEL COSTS. COUNTY shall not pay CONTRACTOR for meals, lodging or other travel costs not included in this Contract. All costs above base contract fee (the not to exceed limit) are capped at _____.
- (4) AUTHORIZATION REQUIRED. Services performed by CONTRACTOR and not authorized in this Contract shall not be paid for by COUNTY. Payment for additional services shall be made to CONTRACTOR by COUNTY if, and only if, this Contract is amended by both parties in advance of performing additional services.
- (5) MAXIMUM CONTRACT AMOUNT. The maximum term of this Contract is _____. The maximum amount payable to Contractor under this Contract for this period shall not exceed _____.

SAMPLE