



MISSOULA COUNTY REQUEST FOR PROPOSALS (RFP)

RFP Title: COMPASS Commission Development and Adult Behavioral Health System Planning Initiative

RFP Due Date and Time: 02/24/2026 at 12:00 NOON Mountain Time

ISSUING DEPARTMENT INFORMATION

Procurement Officer:

Lester Bracey, Missoula County Auditor

Issue Date: 02/14/2026

Procurement Officer Address:

Missoula County
199 W Broadway
Missoula, MT 59802

Procurement Officer Contact Information

lbracey@missoulacounty.us
406-258-3526

OFFEROR SUBMITTAL INSTRUCTIONS

Return Proposal to:

Lester Bracey, Missoula County Auditor
lbracey@missoulacounty.us

Subject Line Must Be Titled:

COMPASS Project

RFP Response Due Date:

02/24/2026 at 12 NOON Mountain Time

OFFEROR CONTACT INFORMATION AND AUTHORIZATION

Offeror Name/Address:

Authorized Offeror Signature:

Print name and sign in ink.

Offeror Phone Number:

Offeror FAX Number (if applicable):

Offeror Email Address:

OFFERORS MUST RETURN THIS COVER SHEET WITH RFP RESPONSE

INSTRUCTIONS TO OFFERORS

Follow the format presented in the RFP. Points may be deducted during scoring for deviations from the prescribed format.

Provide complete answers or descriptions. Read all questions and requirements, and provide clear, concise responses. Do not assume Missoula County or the selection committee will have any familiarity with the firm's capabilities. Proposals are evaluated solely on the information and materials provided in the response.

Adhere to the proposal due date. Late proposals will **NOT** be accepted.

The following items must be included in the submission to be considered responsive:

- Signed Cover Sheet
- Signed Acknowledgment of Addenda (if any)
- All mandatory proposal requirements
- Correctly executed Missoula County "Affidavit for Trade Secret Confidentiality", if the proposal contains confidential or proprietary information as defined in [MCA Title 30, Chapter 14](#).

RFP TIMELINE

EVENT	DATE
RFP issue date	02/14/2026
Pre-proposal conference	N/A
Deadline for submitting written questions	02/19/2026 – 12 NOON Mountain Time
Written responses posted to County website	02/20/2026
RFP response due date	02/24/2026 – 12 NOON Mountain Time
Offeror interviews/product demonstrations	TBD
Contract award	TBD

SECTION 1 - RFP OVERVIEW

INTRODUCTION

Missoula County Community Justice Department increases community safety through partnerships and programs that prevent crime, promotes community health, provides rehabilitation, and supports crime victims. Missoula County Community Justice Department ("the County") is seeking an independent facilitator to design and guide the COMPASS pilot initiative including developing a Commission to oversee the pilot, conducting interviews and focus groups to ensure an inclusive process, and producing several of required work products.

CONTRACT PERIOD

The contract period is one (1) year, with two (2) optional renewal periods. This contract, including any renewals, may not exceed a total of six (6) years. The contract period will begin March 1, 2026.

SINGLE POINT OF CONTACT

The procurement officer will be the single point of contact for inquiries regarding this RFP from the date issued until the selection is publicly announced. Offerors may not communicate with any County officials or staff regarding this procurement, except at the direction of the procurement officer; and any unauthorized contact may disqualify the offeror from further consideration. Contact information for the procurement officer is: **Procurement Officer: Lester Bracey, Missoula County Auditor | E-mail Address: lbracey@missoulacounty.us**

OFFEROR QUESTIONS

Any questions or requests for clarification or interpretation of this RFP must be addressed in writing to the procurement officer on or before **February 19, 2026 – 12 NOON Mountain Time**. For purposes of this RFP, “in writing” consists of email. Questions submitted must include:

- Company name and address;
- Contact information, including name, email address, and telephone number;
- Clear reference to the section, page, and item in question.

Questions received after the deadline will not be considered.

The County will provide a formal written addendum by **February 20, 2026** to questions received by the deadline. No other form of interpretation, correction, or change to this RFP will be binding upon the County. Any addendum will be posted on the County’s [Bids and Proposals](#) webpage.

An Acknowledgment of Addendum must accompany the RFP response.

PREFERENCES

Please note the following Missoula County Resolutions:

- [Resolution No. 2020-076](#) Montana Registered Apprentice Program Resolution
- [Resolution No. 2021-001](#) A Resolution Stating a Preference for Purchasing Goods and Services From Firms Based in Missoula County

GENERAL REQUIREMENTS

Mandatory Requirements of the RFP

To be eligible for consideration, an offeror must provide all information requested in Section 4. A proposal that fails to provide any information requested may be deemed nonresponsive or be subject to deduction of points during scoring.

Understanding of Specifications and Requirements

By submitting a response to this RFP, the offeror attests to an understanding of the specifications and requirements described herein and agrees to comply with such.

Prime Contractor and Subcontractors

If this RFP results in a contract award, the offeror selected will be the prime Contractor and shall be responsible for all work of any subcontractors. The Contractor shall be responsible to the County for the acts and omissions of all subcontractors or agents and of persons directly or indirectly employed by such subcontractors, and for the acts and omissions of persons employed directly by the Contractor. Furthermore, nothing contained within this document, or any contract documents created from any contract awards derived from this RFP shall create a contractual relationship between any subcontractor and the County.

Offeror's Signature

The proposal must be signed by an individual legally authorized to bind the offeror. The offeror's signature is a guarantee that the proposal has been developed without collusion. The offeror shall provide proof of authority of the person signing the RFP upon the County's request.

Offer in Effect for 60 Calendar Days

The offeror may not modify, withdraw, or cancel a proposal for a 60-day period following the RFP due date.

Bid Bond

Bid security is required for all bids submitted in response to an IFB and must be provided in accordance with [MCA 18-1-201 through 206](#). Specifically:

- i. Each bidder must provide a bid bond or other security in the amount of 10% of the bid price to protect and indemnify the county against the failure or refusal of the bidder to enter into the contract, if awarded.
- ii. The bond or other security is subject to forfeit if the bidder fails to enter into a contract within 30 days of bid acceptance.
- iii. The bid bond or other security must be in the form specified in [MCA 18-1-203](#) and payable to the county. Although other forms of security are allowed, the most common forms are cashier's check or bond executed by a surety corporation.
- iv. Bid security is returned to bidders whose bids are not accepted.

PROPOSAL REQUIREMENTS

Proposal Organization

Proposals must be organized into sections that follow the format of this RFP. Pages must be consecutively numbered.

Compliance with Instructions

Scoring points may be deducted for failure to comply with these instructions. Furthermore, a proposal may be deemed nonresponsive and disqualified from consideration if it does not follow the response format, is difficult to read or understand, or is missing required information.

Extraneous or Outside Information

Selection and contract award will be based on the offeror's proposal and the evaluation of other information outlined in this RFP. Offeror responses may not include references to information located on Internet websites, in libraries, or at other external locations unless specifically requested in the RFP. Such information will not be considered, will have no bearing on any award, and may result in the offeror's disqualification from further consideration.

Copies Required and Deadline for Receipt of Proposals

The proposal must be submitted to the County procurement officer by email. Proposals must be labeled with the proposal's name and received by the procurement officer by the due date and time. The offeror is solely responsible for assuring delivery by the deadline.

Late Proposals

Regardless of cause, late proposals will not be accepted and will be automatically disqualified from consideration.

Preparation Costs

The offeror is solely responsible for all costs incurred prior to contract execution.

SECTION 2 - RFP STANDARD INFORMATION

AUTHORITY

This RFP is issued under the authority of the Missoula County Purchasing and Contracts Policy. The RFP process is a procurement option which allows the award to be based on evaluation criteria in addition to cost. Section 6 states the relative importance of all evaluation criteria, and only the evaluation criteria outlined in the RFP will be used.

OFFEROR COMPETITION

The County encourages free and open competition to obtain quality, cost-effective services and products. The specifications contained in proposal requests are designed to accomplish this objective.

PUBLIC INSPECTION OF PROPOSALS

Public Information

All information received in response to this RFP, including copyrighted material, is deemed public information and with one exception will be available for public viewing and copying after the proposal deadline. All requests for information must be made through the County's website for [Public Records Requests](#).

The public will not be able to view bona fide trade secrets meeting the requirements of the [Uniform Trade Secrets Act, Title 30, Chapter 14, Part 4, MCA](#). The procurement officer will remove any such trade secrets from the RFP prior to public viewing.

Bona Fide Trade Secrets

Confidential information meeting the requirements of Title 30, Chapter 14, Part 4, MCA will be available for review only by the procurement officer, the evaluation committee members, and limited other designees. Before the RFP is made available to the public, the procurement officer will remove the confidential information if the following conditions are met:

- Confidential information is clearly marked and separated from the rest of the proposal.
- No confidential material is contained in the cost section.
- An affidavit from the offeror's legal counsel attesting to and explaining the validity of the trade secret claim is attached to the proposal. To make the trade secret claim, legal counsel must use

the [Missoula County “Affidavit for Trade Secret Confidentiality”](#) form available at County’s [Bids and Proposals Policies and Forms](#) webpage.

The offeror shall pay all legal costs and fees associated with defending a claim for confidentiality if a “right to know” request is received from another party.

CLASSIFICATION AND EVALUATION OF PROPOSALS

Classification of Proposals as Responsive or Non-responsive

All proposals will be classified as either “responsive” or “non-responsive.” A proposal is considered “responsive” if it conforms in all material respects to the requirements of the RFP. A proposal may be found non-responsive if:

- Required information is not provided;
- The cost proposal is excessive or inadequate as measured by criteria stated in the RFP;
- Cost information is contained in the body of the RFP rather than in a separate, sealed envelope; or
- The proposal does not conform to the specifications described and required in the RFP.

If a proposal is found to be non-responsive, it will receive no further consideration.

Determination of Offeror Responsibility

The procurement officer and/or the selection committee will decide whether an offeror has met the standards of responsibility based on the requirements of the RFP. Factors used to determine the responsibility may include whether the offeror has:

- The appropriate financial, material, equipment, or human resources to meet all contractual requirements;
- A satisfactory record of integrity;
- The legal ability to contract with the County;
- Provided all information requested for use in the determination of responsibility; and
- A satisfactory record of past performance.

An offeror may be deemed “non-responsible” at any time during the procurement process if information surfaces to support such a determination.

Evaluation of Proposals and Offeror Interviews/Product Demonstration

The remaining proposals will be scored according to the evaluation criteria stated in Section 6. The selection committee may ask finalists to appear for interviews or product demonstrations or to provide written responses to items requiring clarification. Any costs associated with interviews or product demonstrations are the sole responsibility of the offeror.

County’s Right to Investigate and Reject

The County may make such investigations as are deemed necessary to determine the ability of the offeror to provide the product or services specified. The County reserves the right to reject any proposal if the evidence obtained fails to satisfy the County that the offeror is properly qualified to perform the obligations of the contract. This includes the County’s ability to reject a proposal based on negative references.

Offeror Selection and Contract Execution

After an evaluation of the offeror interviews and/or product demonstrations, the selection committee will recommend a contract award, which the procurement officer will communicate to the offeror selected. If the offeror does not accept all material terms of the County contract, the County may move to next ranked offeror or cancel the RFP. The work described in the RFP may begin only after the contract is signed by all parties.

COUNTY'S RIGHTS RESERVED

The RFP in no way constitutes a commitment by the County to award and execute a contract. If such actions are deemed in its best interests, the County, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP;
- Reject any or all proposals received in response to this RFP;
- Waive any undesirable, inconsequential, or inconsistent provisions of this RFP;
- If awarded, suspend contract execution; or terminate the resulting contract if the County determines adequate funds are not available.

SECTION 3 - SCOPE OF PROJECT OF PRODUCT SPECIFICATIONS

1. Background, Purpose, Description of Offeror, and Goals

Background and Purpose: Missoula County Community Justice Department (County/offeror) seeks a qualified facilitator to support the COMPASS initiative, a cross-system planning and system-strengthening effort focused initially on adult behavioral health (Phase 1, “pilot”), with intentional design for integration with justice, housing, health, youth, and child- and family-serving systems (Phase 2).

Missoula County and partners are undertaking the COMPASS initiative pilot to strengthen coordination across behavioral health, crisis response, justice, housing, health, youth, and child- and family-serving systems. The initiative responds to long-standing, well-documented challenges related to system fragmentation, inconsistent transitions, limited shared data, and unclear cross-system roles that contribute to avoidable crisis response, repeated emergency department use, and unnecessary involvement in other high-acuity systems (i.e. justice involvement, housing insecurity/shelter services, emergency health care). Local and statewide assessments, including Sequential Intercept Maps, Community Health Needs Assessments, and the Behavioral Health System for Future Generations initiative, consistently identify the need for coordinated, system-level approaches rather than isolated programmatic solutions. These assessments highlight gaps at key transition points, particularly for individuals with co-occurring behavioral health, substance use, and housing instability, and emphasize the importance of shared governance, data-informed decision-making, and aligned funding strategies.

Missoula County has invested significant effort over many years in programs, partnerships, coalitions, and pilot initiatives that have produced meaningful progress in areas such as crisis response, diversion, housing stabilization, victim services, reentry support, and community collaboration. COMPASS is intended to support and strengthen these successful efforts by providing a structured framework to integrate them more effectively, clarify roles and decision-making pathways, reduce duplication, and ensure that investments are aligned with shared outcomes.

The purpose of this project is to produce a clear, actionable, and evidence-informed framework that enables Missoula County, the Strategic Alliance for Improved Behavioral Health and its partners to support successful existing efforts and to improve outcomes, reduce preventable harm, and use public resources more effectively by addressing fragmentation across systems of care. The project emphasizes system-level analysis and coordination rather than program-by-program planning, recognizing that many

of the County's most persistent challenges arise from how systems interact rather than from isolated service gaps. The COMPASS initiative will translate years of analysis and planning into practical governance tools, shared measures, prioritized investment frameworks, and implementation-ready recommendations that are suitable for review by County leadership, partner agencies, and elected officials. All work products are advisory in nature and are designed to inform, not replace, existing statutory authority or formal decision-making processes.

Description of Offeror, Initiative Partners, and Project Funders

Montana Department of Public Health and Human Services Crisis Diversion Grant (CDG) supports local efforts to strengthen alternatives to emergency departments, law enforcement, and jail for individuals experiencing behavioral health crises. Communities receiving these funds must coordinate plans and projects through an identified coalition. In Missoula County the identified coalition is the Strategic Alliance for Improved Behavioral Health (SABH). CDG funding supports coordinated crisis response, stabilization, and diversion planning aligned with state priorities.

Funding for facilitation of the COMPASS initiative pilot up to fifty thousand dollars (\$50,000) is provided through the Crisis Diversion Grant. An additional twenty-five thousand dollars (\$25,000) in funding for administrative support will be contributed by the SABH Steering Committee.

Strategic Alliance for Improved Behavioral Health Community Coalition (SABH) is a broad, cross-sector partnership that includes behavioral health providers, public health agencies, health care organizations, education partners, justice system service providers, housing and homelessness providers, and community members. The coalition supports coordination, information sharing, and collaborative problem-solving across the behavioral health continuum.

Strategic Alliance for Improved Behavioral Health Steering Committee ("Steering Committee") is composed of representatives from the City of Missoula, Missoula County, Public Health Department, and regional behavioral health and health care providers. It sets direction and aligns partners working to strengthen Missoula County's behavioral health system; establishes shared priorities and measures; guides coordinated planning and funding strategy; and supports accountability for progress across crisis response, stabilization, treatment, recovery supports, and system integration.

The Steering Committee also has available funds, held by the County, approved for the COMPASS project. The Steering Committee has approved up to twenty-five thousand dollars (\$25,000) for the support of the COMPASS project, to be allocated across administration, design, meeting costs, and other similar functions/costs.

Missoula County Community Justice Department provides community-based justice services including crime victim advocacy, pretrial services, diversion and problem-solving initiatives, misdemeanor supervision, and reentry navigation. The department also supports system-level coordination, data-informed planning, and cross-agency collaboration related to crisis response and justice-behavioral health interfaces.

Facilitator Role and COMPASS Initiative Pilot Goals:

Designs and leads COMPASS initiative strategic processes; designs and facilitates meetings; ensures balanced participation; synthesizes complex input into actionable products; maintains alignment with Strategic Alliance governance, SAMHSA Systems of Care principles, and project timelines; and supports

development of final deliverables. The selected facilitator will guide a structured, cross-disciplinary process involving 2 key elements:

1. *Support and facilitate the development and implementation of the COMPASS Commission*—a cross-sector advisory body established to support elected officials and existing authorities in addressing complex, multi-generational challenges that span behavioral health, housing, justice, public health, health care, and youth systems. During the pilot project the Commission will only focus on the adult behavioral health system. Commission members serve as system representatives and subject-matter contributors; provide access to system data and operational context; validate findings; support system partner engagement; and assist in translating analysis into feasible policy, funding, and operational recommendations. Commission members act as liaisons between the project and their respective agencies and coalitions.
2. *Provide the Commission with the information, data, reports, and information needed to make data-informed decisions and recommendations to local elected officials and other decision makers*. The facilitator conducts local interviews and focus groups; synthesizes existing local, state, national, and international research; integrates lessons learned from prior local planning efforts and comparable jurisdictions; and incorporates operational insight from frontline staff and people with lived experience. Artificial intelligence tools may be used as decision support to synthesize large volumes of information, identify patterns and leverage points, and support scenario and cost benefit analysis, while preserving human judgment, transparency, and established governance authority. Specific activities and information requests will be directed by the Commission once they are seated.

Goals:

- **Improve system-level outcomes related to health, safety, and stability across the full continuum of care.**
Strengthen and better align existing prevention, early intervention, crisis response, stabilization, and recovery and long-term support efforts to reduce avoidable emergency department use, repeated crisis contacts, and unnecessary justice involvement and/or housing instability, while improving continuity of care, stabilization, long-term recovery outcome while reducing risks of future generational involvement in these systems of care.
- **Build a coordinated, accountable cross-system framework that supports existing strengths.**
Establish shared priorities, governance tools, roles, and performance measures that align the local behavioral health system around common outcomes, while reinforcing effective partnerships, programs, and practices already operating successfully in Missoula County.
- **Reduce fragmentation, duplication, and administrative burden while preserving effective services.**
Identify and address overlapping structures, unclear responsibilities, and high-friction processes that limit effectiveness, strain the workforce, and increase costs, while intentionally protecting and strengthening high-performing programs and collaborative efforts.
- **Support data-informed decision-making and transparency across systems.**
Build on existing data and evaluation capacity to develop shared measures, reporting tools, and analytic approaches, including responsible use of artificial intelligence as decision support, to improve system intelligence, planning, performance monitoring, and public accountability.
- **Guide strategic investment and long-term sustainability based on what works.**
Produce a prioritized multi-year framework to inform County, the Strategic Alliance for Improved Behavioral Health and partner investment decisions, support cost-avoidance and reinvestment

strategies, and reduce reliance on short-term or misaligned funding, while sustaining effective programs and infrastructure.

- **Integrate cross-disciplinary strategies to identify high-impact leverage and hinge points.** Investigate, review, select, and integrate applicable strategies from a range of professional disciplines, including public health, behavioral health, justice, housing, systems engineering, and organizational change, to identify key leverage or hinge points for high-impact cross-system interventions and to surface patterns, redundancies, gaps, and misalignments that are not visible through traditional, siloed planning processes.
- **Create a scalable and transferable model rooted in local success.** Ensure that methods, tools, and recommendations produced through the pilot are applicable to future phases of system integration, aligned with state initiatives, and suitable for adaptation or replication in other Montana communities with similar strengths and constraints.

Expected Outcomes

By the end of the pilot year, Missoula County will have a clearer, more coordinated behavioral health and crisis response system with stronger integration of justice and housing partners; standardized crisis navigation and transition pathways; improved coordination for high-utilizer populations; reduced avoidable emergency department and jail utilization; and a strengthened Strategic Alliance governance structure capable of sustaining alignment, accountability, and data-informed decision making. The final work products will provide DPHHS and local leadership with a practical, scalable model for behavioral health system integration.

2. General Statements

The Contractor may be either a “for profit” or “not for profit” corporation.

The contractor will design and lead Phase 1 pilot of the COMPASS Initiative

3. Required Program Elements

3.1 Governance, Operating Framework, Cost Analysis

The facilitator will support the development and adoption of a clear governance and operating model for the pilot, including:

- A Commission-adopted project charter defining purpose, scope, roles, decision rights, escalation thresholds, and operating cadence. Provide a 12-month work plan with meeting structures, workgroups, and products tied to Phase 1 outputs.
- Standard agendas, decision memos, workgroup reporting, and documentation.
- A practical governance operating model describing how decisions are prepared, documented, escalated, and tracked month to month.
- A defined process for managing cross-system issues, requests, and priorities to prevent fragmentation and duplication. Establishes how decisions are made, documented, escalated, and followed through during the pilot.
- Develops a decision-support model that standardizes how strategies are evaluated using cost, estimated impact, difficulty of project, and likelihood of success.

- Provides cost findings to guide priorities including cost of inaction, cost benefit analysis, opportunity to reduce or reallocate costs, duplication and misalignment of funds, cost avoidance opportunities.
- Develops preliminary framework for Funding Alignment and Reinvestment Strategy based on aligned and braided funding, sustainability planning, and reinvestment of avoided costs.
- Clarifies cross-system authorities, responsibilities, decision points and communication agreements, agency roles, responsibilities and accountability determined by which authority, and an escalation and conflict resolution path.
- Develops a structured protocol establishing how learning, refinement, and adjustment occur over time, based on performance information and implementation experience including an annual refresh and reprioritization process; defined criteria for revising strategies, priorities, or approaches based on evidence and implementation realities; and decision tracking, documentation, and version control rules to ensure transparency and institutional memory.

Outputs include: a Project Charter and Governance Package; Governance Operating Model; decision and documentation templates; Cost benefit analysis package; Description of cross-system roles for new staff, partners, etc.; Learning and Adaptation Protocol.

3.2 System Landscape and Structured Information Gathering

The facilitator will develop a shared cross-system understanding of the adult behavioral health ecosystem and its key interfaces of key agencies, partner organizations, coalitions, workgroups, and across justice, behavioral health, housing, youth systems, public health, victim services, tribal partners, and lived experience. The focus is descriptive and functional, not evaluative. This includes:

- A cross-system, multilevel ecosystem map/inventory identifying major agencies, programs/services, coalitions and other workgroups, statutory mandates or responsibilities, current operational service models.
- Conducts structured engagement with providers from specific practice areas (i.e. prevention, crisis response, treatment and recovery), frontline staff, lived experience participants, and other identified partner systems.
- Identification of system and service strengths and successful activities; recurring issues; failure points, and other themes from all identified sources.

Outputs include: System Ecosystem Map/inventory; Partner/Specialist Report of Findings; Documentation of known issues and constraints related to service gaps, eligibility rules, funding, workforce, data, unstable funding and/or policy.

3.3 Current-State Pathways and Friction/Issues Analysis

The facilitator shall illustrate how individuals currently move through key pathways, with attention to where processes stall, repeat, or fail. This includes:

- Current-state pathway maps for crisis response, stabilization, justice touchpoints, and housing-related transitions.

- Identification of critical handoffs, dependencies, and interface points across crisis response, justice, housing, health care, and reentry.
- Identification of bottlenecks, duplication, and high-friction administrative processes.

Outputs include: Current-State Pathway Maps; Strengths, Needs, Gaps, Duplication, and Administrative Burden Analysis.

3.4 Evidence and Context Review

The facilitator will compile and synthesize relevant local, state, and national evidence to inform decision-making. This includes:

- A structured evidence directory organized by system function (prevention, crisis response, stabilization, treatment, recovery, housing stability, reentry).
- Synthesize identified recurring themes and known failure modes in system integration.
- Alignment of real-world practices to applicable standards and guidance and evidence-based practices and service models.
- Development of a replicable process to identify and analyze key cross-discipline protective, risk, and resiliency factors to strengthen and strategically align prevention and intervention efforts.
- A method for recommending findings and recommendations for further research including ongoing leverage/hinge point analysis; development of cross-domain “pillars of practice” (minimum practice expectations that capitalize on identified leverage points), etc.

Outputs include: Evidence Directory; Evidence Synthesis Memos; Key Findings and Recommended Research Memo.

3.5 Shared Outcomes, Measures, and Data Foundations

The facilitator shall support development of a shared, pilot-level measurement framework to support governance and learning. This includes:

- A set of local and state benchmarks that are leading or lagging indicators of both positive and negative outcomes for adults involved in the behavioral health system.
- A set of shared outcomes, key performance indicators, and defined measures.
- Clear definitions, data sources, stewards/responsible owners, and reporting cadence.
- A minimum viable data governance approach addressing stewardship, permissible use, and constraints.
- Dashboard specification or reporting template (there no requirement to build new software systems to actual dashboard).
- Develop an inventory of current required reporting by local organizations organized by sector and purpose (prevention, crisis response, stabilization, treatment, recovery, housing stability, reentry, victim safety, youth support) that might be leveraged to create a shared local “report card”.
- Investigate feasibility and required investment to develop a cross-system report and longitudinal

outcomes tracking of people who frequently cycle through existing systems using de-identified information to track frequency, transition failures, and/or potential system improvements.

Outputs include: Identified benchmarks, current reported rates, and review process; Shared Outcomes, Measures, and Accountability Framework; Data Reporting, Stewardship and Data-Sharing Package; Dashboard and/or Reporting Specification; Feasibility Memo

3.6 Priority Identification and Phase 2 Readiness

The facilitator will support the Commission in identifying a small number of high-impact priorities for recommended action and preparation for Phase 2 decisions. This includes:

- A prioritized list of high-impact cross-system leverage/hinge points and rationale to develop initiatives with problem statements, desired outcomes, dependencies, and early proof points.
- Identification of policy, funding, data, and operational constraints.
- A Phase 2 Readiness Decision Memo summarizing what Phase 1 established, what remains uncertain, and conditions required for Phase 2 success.
- Two to three Phase 2 scope options with high-level benefits, risks, and required commitments.

Outputs include: High-Impact Priority List; Phase 2 Readiness Decision Memo and Scope Options.

3.7 Decision Package for Elected Officials and Funders (Required)

The facilitator will produce consolidated, decision-ready package that compiles Commission-endorsed recommendations requiring action by elected officials, funders, and formal partners. The package is intended to clearly distinguish decision authority, document rationale, and support timely and informed action.

- A summary of recommended actions organized by decision authority (County Commissioners/elected officials, funders, partner agencies) and rationale.
- Priority investments, funding requests, or resource reallocations, if applicable.
- Recommended policy, ordinance, or administrative changes and rationale.
- Required partner commitments, including memoranda of understanding, shared standards, or reporting expectations.

Outputs: Consolidated report with rationale and appropriate documentation suitable for public processes.

3.8 COMPASS Pilot Report for Statewide Partnership

The facilitator will prepare a replication-ready report and supporting materials designed to enable state agencies, regional partners, or peer jurisdictions to understand, adapt, and apply transferable elements of the COMPASS Pilot. The report is informational and does not presume statewide adoption.

The Replication-Ready Report may include:

- A concise summary of pilot methods, scope, and key findings.
- Transferable tools and artifacts, such as templates, scoring frameworks, dashboards, or governance tools.

- A high-level implementation roadmap and documented lessons learned.
- Alignment to relevant state priorities, initiatives, or grant frameworks at a summary level.

Output: COMPASS Pilot Report

3.9 COMPASS Final Public Report (Pilot Year) and Strategic Alliance Work Plan

The facilitator will produce a public-facing report documenting the pilot’s baseline conditions, actions taken, and observed changes over the pilot year. The report is intended to support transparency and shared understanding, not program evaluation or performance scoring. Additionally, the facilitator will produce a 2-year work plan based on Commission recommendations. These may include:

- A summary of baseline conditions and year-end trends.
- Actions taken during the pilot period and barriers addressed or resolved.
- High-level outcome movement and equity-related observations, where available.
- A summary of recommended next-phase direction, subject to formal decision-making.

Goals, objectives, tasks that will guide the next 2 years of SABH priorities and activities.

Outputs: COMPASS Final Report and Strategic Alliance 2-Year Work plan.

3.10. Phase 2 Readiness Decision Memo and Scope Options

The facilitator will produce a structured decision memorandum that supports Commission and elected official consideration of whether and how to proceed to Phase 2. The memo supports decision-making and does not assume decision-making authority. The Memo may include:

- A summary of what Phase 1 established and what remains uncertain.
- Two to three Phase 2 scope options with clearly differentiated focus and scale.
- Required commitments, dependencies, and enabling conditions for each option.
- Identified risks, constraints, and feasibility considerations.

4. Deliverable Standards and Formats

All deliverables will be:

- Written in clear, professional language suitable for public-sector processes and decision-making
- Commission-ready, with clear version control and documented assumptions.
- Designed to support decision adoption.
- Longer documents will include an executive summary or Commission-ready briefs (generally 2–5 pages) for decisions.
- All documents will include citations when referencing research materials.

5. Coordination and Alignment

The facilitator is expected to:

- Coordinate with existing coalitions, agencies, and planning processes.
- Utilize prior local and state studies and reports in combination with national studies, reports, data, and other information.

- Avoid duplicative data collection where adequate information exists.

6. Authority and Limitations

All recommendations developed by the facilitator are advisory and subject to Commission and elected official action. The facilitator does not:

- Set policy
- Direct agencies or staff
- Make funding or implementation decisions

7. Payment

See SECTION 5. COST PROPOSAL below.

8. Additional Contractor Requirements if Selected

- Prior to execution of this agreement, Contractor shall provide the Missoula County Community Justice Department with the qualifications of its program and its employees. Contractor acknowledges that Missoula County will rely upon Contractor's representations regarding its qualifications, including those of both the facility and its employees, for carrying out the duties required under this agreement. Contractor shall notify Missoula County of any change in any such qualifications. Upon receipt of such notification, Missoula County reserves the right to determine in its sole discretion whether the Contractor continues to qualify to carry out the requirements of this agreement within its established standards. Any failure of Contractor to meet the required qualifications will constitute default under this agreement.
- Contractor must be insured and provide proof of insurance. Agency must agree to indemnify, defend, and hold harmless Missoula County, its agents, employees and officers, from any and all liability, cost, or expense, including but not limited to attorneys' fees, arising out of or relating to the providing Pretrial Supervision for all referrals, regardless of whether caused in part by the acts or omissions of Agency.
- The Contractor shall provide additional documents within forty-five (45) days of signature on the contract and anytime thereafter if they change.
- The Contractor shall notify Missoula County of any change in its business organizational status within 45-day of such a change.

Missoula County reserves the right to request additional information or adjustments to the scope of work based on evolving community and court needs.

SECTION 4 - OFFEROR QUALIFICATIONS

Due to the complexity and sensitivity of this initiative the following qualifications are strongly preferred:

Minimum Qualifications of agency and/or principal contact:

- 5+ years developing and leading complex strategic planning. 3+ years involvement with behavioral health systems of care, housing insecurity/homelessness systems, health systems, youth systems of care, justice system services, crime victim services (“systems of care”).
- 3+ years’ experience working with or within multiple systems, Missoula-based systems of care, experience with the Strategic Alliance for Improved Behavioral Health, and experience with other area coalitions, task forces, work groups, etc.
- Demonstrated experience with developing meaningful and productive engagement to achieve goals in complex organizations at multiple levels (i.e. front-line worker, new employees, mid-level management, senior leadership, founders/directors/CEOs.)
- Demonstrated strong and productive relationship with Missoula County’s systems of care leadership (including boards of directors); with DPHHS policy and grants administration staff; with area systems of care funders.
- Demonstrated experience with strategic communications, program design, development, and/or implementation.
- Understanding of research principles in public health, public administration, sociology, criminology, human and social services and/or justice system services.
- Understanding of Montana community dynamics especially pertaining to relationship between urban/regional centers and semi-rural, rural, frontier, and tribal communities.
- Ability to identify and utilize outside technical expertise in the areas of AI assisted research, data collection and management in alignment with Montana’s open records laws.

NOTE: Facilitation must be available to start March 1, 2026. Project is grant funded with preliminary approval. Payment for project is dependent on County receiving final approval. Date of approval is not yet determined but anticipated soon. Additionally, the work of the Commission is anticipated to run from March 1 – December 31, 2026 with final report writing completed by January 31, 2027.

To enable the County to evaluate the capabilities of the offeror and its ability to supply the product and/or services specified in this RFP, the offeror must provide the following:

1. Introduction and Purpose of Proposal

- a. Introductory letter or statement of interest.
- b. Firm name, address, and principal contact for this RFP.
- c. Table of Contents including page numbers of the RFP.
- d. An Executive Summary or abstract of the key features of the proposal (no more than one page).

2. Company Profile and Firm Experience

- a. Names of officers of the company or executives in charge of the overall project including the president/chair of Board of Directors (if applicable).
- b. A general description of the firm including:
 - Years in business under present and any previous names.
 - Type of organization (e.g., nonprofit, limited liability corporation, partnership, etc.).
 - Primary source of business.
 - Organizational structure and size (this may be an organizational chart).

- c. Describe your company's expertise in facilitating complex planning, group development, and reporting and how it meets the requirements listed in the scope of services:
 - Description of similar past projects or services provided.
 - The dates the services were provided.
 - The client/s for whom the services were provided.
 - Contact information for the client/s.

3. What Will Be Done - Project Specific Information

- a. Describe measurable **goals and objectives** for the proposed project including:
 - The specific tasks and activities necessary to accomplish each goal and objective. Include a timeline that identifies when the tasks and activities will be accomplished when appropriate or if the task is ongoing.
 - The number of staff/FTE/hours and their titles needed to provide these services.

4. Who Will Implement - Experience of Personnel

- a. Identify the key individuals and organizations involved in the proposed project.
- b. Demonstrate that the individuals and organizations identified have the capacity to address the stated need and can successfully implement the proposed project activities; attach job descriptions of all key personnel.
 - Provide job description of positions that will provide the described services (or describe the education, experience, training, and/or certification that you require for personnel assigned to work for the program);
 - Describe number of employees, and years of experience performing services similar to those described within this RFP (or provide resume or summary of qualifications, work experience, education, certification, and skills for all key personnel, including any subcontractors, who will perform any aspect of this contract. Include each individual's anticipated role and years of experience providing services similar to those described in this RFP).

5. References

Provide a minimum of three (2) references clients and/or partners with your company. Provide the following information for each:

- Name of organization
- Services provided
- Date of service
- Location of client
- Contact name and title
- Contact's telephone number and email address

6. Interviews or Product Demonstrations

The County reserves the right to conduct interviews or observe product demonstrations. If the County chooses to exercise this option, the offeror's key personnel for this project must be available for the interview in Missoula, Montana.

INSURANCE REQUIREMENTS

Contractor will be required to maintain general liability insurance in the amount of one million dollars (\$1,000,000) per occurrence and two million dollars (\$2,000,000) in the aggregate. Contractor will be required to provide professional liability insurance.

In accordance with [§§ 39-71-401](#) and [39-71-405 MCA](#), Contractor agrees to provide workers' compensation insurance for its employees and program participants while performing work under this Agreement. Contractor shall provide proof of compliance in the form of workers' compensation insurance or documentation of corporate officer status and maintain such insurance or corporate officer status for the duration of the contract.

All insurance policies required must be from an insurance carrier licensed to do business in the State of Montana. Contractor agrees to furnish proof of required insurance to the County prior to commencing work under Agreement. Missoula County must be listed as an additional insured on the general liability insurance certificate for this Agreement unless otherwise specified by Missoula County.

SECTION 5 – COST PROPOSAL

The cost proposal must be submitted in a separate email attachment to be considered responsive to the requirements of this RFP. The cost proposal must not be included in the body of the proposal. The total funding available for the facilitation of the COMPASS pilot project is fifty thousand dollars (\$50,000), exclusive of the twenty-five thousand dollars (\$25,000) held by the County on behalf of the Steering Committee. A complete cost proposal must include an explanation of use of the additional \$25,000 should the Contractor plan to use these funds to complete the proposed project.

Payment

Payment for services will be paid monthly or quarterly upon receipt of a valid invoice. The Contractor must also submit the required final reports and deliverables to receive full payment. *Additionally, for services performed from July 1, 2026 to January 31, 2027, Contractor will be prepaid; however, such prepayment necessitates that Contractor complete all deliverables due during this timeframe. If Contractor does not complete all deliverables due during this timeframe, Contractor agrees to and will immediately return to County, any unearned portion of the prepayment.*

SECTION 6 – EVALUATION PROCESS

The selection committee will review and evaluate the proposals according to the criteria that follow, based on a total number of 100 points. The committee may request a follow-up interview if needed.

EVALUATION CRITERIA

What Will Be Done (30 points)

The extent to which the applicant describes or provides:

- Program goals, objectives, specific tasks and activities necessary to accomplish each goal and objective.
- The expected outcomes of the Program.
- The program's capacity to provide the required services, reports, and deliverables.

Who Will Implement (30 points)

The extent to which the applicant describes or provides:

- The key individuals, organizations, and project partners involved in the proposed project and their respective roles and responsibilities.
- The capacity of those involved in the proposed project to successfully implement the proposed project activities and meet the anticipated volume of people ordered to the Program.
- The summary of qualifications, work experience, education, certification, and skills for all key personnel.

Cost Proposal (30 points)

The extent to which the applicant describes or provides:

- An explanation of the program's fee schedule (if applicable).
- The extent to which the cost proposal is cost effective.

Completeness Of Application (10 points)

The extent to which the applicant submitted a complete application with all required elements.

MISSOULA COUNTY STANDARD TERMS AND CONDITIONS

By submitting a response to this invitation for bid, request for proposal, or limited solicitation, the vendor agrees to acceptance of the following Standard Terms and Conditions and any other provisions that are specific to this solicitation or contract.

ACCEPTANCE/REJECTION OF BIDS, PROPOSALS, OR LIMITED SOLICITATION RESPONSES: The County reserves the right to accept or reject any or all bids, proposals, or limited solicitation responses, wholly or in part, and to make awards in any manner deemed in the best interest of the County. Bids, proposals, and limited solicitation responses will be firm for 30 days, unless stated otherwise in the text of the invitation for bid, request for proposal, or limited solicitation.

ACCESS AND RETENTION OF RECORDS: The contractor agrees to provide the County, the County Auditor, or authorized agents, access to any records necessary to determine contract compliance. The contractor agrees to create and retain records supporting the services rendered or supplies delivered for a period of three years after either the completion date of the contract or the conclusion of any claim, litigation, or exception relating to the contract taken by Missoula County or third party.

ALTERATION OF SOLICITATION DOCUMENT: In the event of inconsistencies or contradictions between language contained in the County's solicitation document and a vendor's response, the language contained in the County's original solicitation document will prevail. Intentional manipulation and/or alteration of solicitation document language will result in the vendor's disqualification.

ASSIGNMENT, TRANSFER AND SUBCONTRACTING: The contractor shall not assign, transfer or subcontract any portion of the contract without the express written consent of the County.

AUTHORITY: The attached bid, request for proposal, limited solicitation, or contract is issued under the authority of the Missoula County Purchasing and Contracts Policy.

COMPLIANCE WITH LAWS: The contractor must, in performance of work under the contract, fully comply with all applicable federal, state, or local laws, rules and regulations, including the [Montana Human Rights Act](#), the [Civil Rights Act of 1964](#), the [Age Discrimination Act of 1975](#), the [Americans with Disabilities Act of 1990](#), and [Section 504 of the Rehabilitation Act of 1973](#). Any subletting or subcontracting by the contractor subjects subcontractor to the same provisions. In accordance with [MCA 49-3-207](#), the contractor agrees that the hiring of persons to perform the contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or nation origin by the persons performing the contract.

CONFORMANCE WITH CONTRACT: No alteration of the terms, conditions, delivery, price, quality, quantities, or specifications of the contract shall be granted without prior written consent of Missoula County. Supplies delivered which do not conform to the contract terms, conditions, and specifications may be rejected and returned at the contractor's expense.

DEBARMENT: The contractor certifies, by submitting this bid or proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded

from participation in this transaction (contract) by any governmental department or agency. If the contractor cannot certify this statement, attach a written explanation for review by the County.

DISABILITY ACCOMMODATIONS: The County does not discriminate on the basis of disability in admission to, access to, or operations of its programs, services, or activities. Individuals who need aids, alternative document formats, or services for effective communications or other disability related accommodations are invited to make their needs and preferences known to the County department issuing the solicitation. Interested parties should provide as much advance notice as possible. For this RFP the point of contact is the Community Justice Department. Email sgaynor@missoulacounty.us.

FAILURE TO HONOR BID/PROPOSAL: If a bidder or offeror to whom a contract is awarded refuses to accept the award or fails to deliver in accordance with the contract terms and conditions, the County may, in its discretion, suspend the bidder or offeror for a period of time from entering into any contracts with Missoula County.

FORCE MAJEURE: Neither party shall be responsible for failure to fulfill its obligations due to causes beyond its reasonable control, including without limitation, acts or omissions of government or military authority, acts of God, materials shortages, transportation delays, fires, floods, labor disturbances, riots, wars, terrorist acts, or any other causes, directly or indirectly beyond the reasonable control of the nonperforming party, so long as such party is using its best efforts to remedy such failure or delays.

HOLD HARMLESS/INDEMNIFICATION: The contractor agrees to protect, defend, and save the County, its elected and appointed officials, agents, and employees, while acting within the scope of their duties as such, harmless from and against all claims, demands, causes of action of any kind or character, including the cost of defense thereof, arising in favor of the contractor's employees or third parties on account of bodily or personal injuries, death, or damage to property arising out of services performed or omissions of services or in any way resulting from the acts or omissions of the contractor and/or its agents, employees, representatives, assigns, subcontractors, except the sole negligence of the County, under this agreement.

LATE BIDS AND PROPOSALS: Regardless of cause, late bids and proposals will not be accepted and will automatically be disqualified from further consideration. It shall be solely the vendor's risk to ensure delivery at the designated office by the designated time. Late bids and proposals will not be opened and may be returned to the vendor at the expense of the vendor or destroyed if requested.

PAYMENT TERMS: All payment terms will be computed from the date of delivery of supplies or services OR receipt of a properly executed invoice, whichever is later. Unless otherwise noted in the solicitation document, the County is allowed 30 days to pay such invoices. All contractors will be required to provide banking information at the time of contract execution in order to facilitate County electronic funds transfer payments.

RECIPROCAL PREFERENCE: The County applies a reciprocal preference against a vendor submitting a bid from a state or country that grants a residency preference to its resident businesses. Such reciprocal preference is applied only to competitively bid projects for construction, repair, or maintenance of a building, road, or bridge in excess of \$50,000.

REGISTRATION WITH THE SECRETARY OF STATE: Any business intending to transact business in Montana must register with the Secretary of State. Businesses that are incorporated in another state or country, but which are conducting activity in Montana, must determine whether they are transacting business in

Montana in accordance with [MCA 35-8-1001](#). Such businesses may want to obtain the guidance of their attorney or accountant to determine whether their activity is considered transacting business.

If businesses determine that they are transacting business in Montana, they must register with the Secretary of State and obtain a certificate of authority to demonstrate that they are in good standing in Montana. To obtain registration materials, visit the [Office of the Secretary of State website](#) or call (406) 444-3665.

SEPARABILITY CLAUSE: A declaration by any court, or any other binding legal source, that any provision of the contract is illegal and void shall not affect the legality and enforceability of any other provision of the contract, unless the provisions are mutually dependent.

SHIPPING: Supplies shall be shipped prepaid, F.O.B. Destination, unless the contract specifies otherwise.

SOLICITATION DOCUMENT EXAMINATION: Vendors shall promptly notify the County of any ambiguity, inconsistency, or error which they may discover upon examination of a solicitation document.

TAX EXEMPTION: Missoula County is exempt from Federal Excise Taxes (#81-6001397).

TERMINATION OF CONTRACT: Unless otherwise stated, the County may, by written notice to the contractor, terminate the contract in whole or in part at any time the contractor fails to perform the contract.

UNAVAILABILITY OF FUNDING: The contracting department, at its sole discretion, may terminate or reduce the scope of the contract if available funding is reduced for any reason.

U.S. FUNDS: All prices and payments must be in U.S. dollars.

VENUE: This solicitation is governed by the laws of Montana. The parties agree that any litigation concerning this bid, request for proposal, limited solicitation, or subsequent contract, must be brought in the Fourth Judicial District in and for the County of Missoula, State of Montana, and each party shall pay its own costs and attorney fees.

WARRANTIES: The contractor warrants that items offered will conform to the specifications requested, to be fit and sufficient for the purpose manufactured, of good material and workmanship, and free from defect. Items offered must be new and unused and of the latest model or manufacture, unless otherwise specified by the County. They shall be equal in quality and performance to those indicated herein. Descriptions used herein are specified solely for the purpose of indicating standards of quality, performance, and/or use desired. Exceptions will be rejected.