

5. SECTION B - SCOPE OF SERVICES:**5.1 BACKGROUND**

- A. The Home Sharing Program ("Program") has been identified as one of the priorities for the Age-Friendly Montgomery Housing Workgroup to help Montgomery County, Maryland ("County") residents remain in their homes longer. The County's Department of Health and Human Services ("DHHS") intends to implement this Program to match County homeowners ("HO") with home-seekers ("HS") to facilitate long-term rental agreements.

5.2 INTENT

- A. DHHS is seeking an experienced, and capable entity to provide the Program utilizing volunteers and/or paid staff ("Staff"). The Program facilitates stable matches of HO with HS on an equitable and nonsectarian basis that develop into long-term relationships and rental agreements to enhance older adults' ability to age at home.
- B. The County intends to award one (1) contract under this Request for Proposals (RFP). The total estimated annual compensation for the contract resulting from this solicitation is \$196,000.00. The County makes no guarantee of a specific compensation amount. All compensation payable under any contract resulting from this solicitation is subject to, and contingent upon, the State and County's appropriation and encumbrance of funding for this Program described in this solicitation.
- C. In the event the County receives additional funding for services requested under this solicitation, the County reserves the right to expand the existing scope of services for the resulting contract. Such additional services are not guaranteed and will only be requested if funds for additional services are appropriated and encumbered by the County. These expanded services may be added during negotiations or added via an amendment to the Contract.

5.3 SCOPE OF SERVICES

- A. The Contractor must provide the necessary personnel, and materials, to facilitate rental agreements between HO and HS in an equitable and nonsectarian basis within the County.
- B. As part of the Program, the Contractor must provide the following services:
 - i. Develop, implement, and maintain written Program policies and procedures, subject to County approval within ninety (90) days of the effective date of the contract resulting from this RFP.
 - ii. Train all assigned Staff before they provide services to HO and HS.
 - iii. Raise public awareness of the Program to ensure HO and HS have the largest variety of match options. The Contractor must provide a marketing plan that lists all proposed outreach activities. The Contractor must acknowledge in all publicity that the County is funding this Program.
 - iv. Maintain a phone line and a website for the Program and respond to callers within 1-2 business days.
 - v. Respond to all HO and HS callers and offer intake when appropriate.
 - vi. Provide technical assistance to HO and HS to support the rental process, including providing rental agreement templates, information on their rights, and obligations, and ways to address disputes.
 - vii. Provide referrals to HO and HS with other needs for any services deemed necessary by the Contractor and refer HO and HS to other County resources.
 - viii. Facilitate rental agreements for 5 unduplicated HO with HS quarterly.
 - ix. Provide guidance to HO and HS on landlord tenants resources, including but not limited to, the Department of Health and Community Affairs checklist and room rental guidelines, (See www.montgomerycountymd.gov/DHCA/Resources/Files/housing/landlordtenant/publications/hbk_room_rent_eng.pdf) to determine whether a HO is offering an acceptable space according to the guidelines.

- x. Provide administrative support and on-going training to Staff.
 - xi. Establish a mechanism and quality assurance procedure for collecting data on matches. This includes a waitlist for whom the Contractor has not found suitable matches.
 - xii. Submit the required monthly, quarterly, and annual reports, as outlined in this RFP.
 - xiii. The Contractor must systematically monitor matches between HO and HS as follows:
 - a. The Contractor must personally contact all matched clients after the rental agreement has been activated between the HO and the HS to determine each client's level of satisfaction with his/her match. Monthly check-ins must continue for a minimum of 6 months (or longer if needed).
 - b. If the HO or HS is experiencing challenges, the Contractor must offer resources (Housing counseling, financial counseling, or other relevant resources) to assist in resolving the challenge.
 - xiv. The Contractor must attempt to serve all current and prospective County residents who wish to participate in the Program.
 - a. HO must be County residents.
 - b. HS may be County residents or residents of other jurisdictions who wish to move into the County.
 - xv. The Contractor must have a County-approved implementation plan on the start date of the contract resulting from this RFP to ensure continuation of services for HO and HS who are currently enrolled in the County's Program. Services must continue within fifteen (15) days of the execution of the contract resulting from this RFP to ensure there is no interruption to direct services.
- C. The Contractor must have the capacity to facilitate the Room Ready Program (**Attachment F**) in the event additional funds become available. The Contractor must choose to incorporate the Room Ready Program into their current proposal as a separate line item within their proposed budget utilizing the HHS Budget Form (**Attachment E**).
- D. Upon the expiration or termination of the Contract, or upon County's request, the Contractor must provide conversion and all services necessary for an orderly transition of services covered under this contract, in whole or in part, to another contractor, including, without limitation, the transfer of all clients' records, financial records pertaining to the Program specified in this solicitation, and other data in the possession, custody or control of the Contractor. The County shall facilitate a smooth transition between the outgoing contractor for this program and the incoming contractor.
- E. The Contractor must implement and maintain reasonable security practices and procedures to include requiring any third party to whom it discloses personal information originally disclosed to Contractor by the County to also implement and maintain reasonable security practices and procedures related to protecting the personal information disclosed.
- F. The Contractor must comply with the U.S. Department of Health and Human Services Office of Minority Health National Standards for Culturally and Linguistically Appropriate Services (CLAS), which can be found at <http://www.montgomerycountymd.gov/HHS/DoingBuswDHHS.html>
- G. The Contractor must notify the County within 48 hours of a security breach of a system if the unauthorized acquisition of an individual's personal information has occurred or is reasonably likely to occur and must share with the County all information related to the breach.
- H. The Contractor must comply with all federal, State, and local laws and regulations governing privacy and the protection health information, including but not limited to, the Health Insurance portability and Accountability Act (HIPPA). The resulting contractor must also sign and comply with the County's Business Associate Agreement (**Attachment D**).

- I. The Contractor must comply with Department of Health and Human Services Background Clearance Policy requirements for staff as stated in the link listed below. At a minimum, any and all staff and volunteers having unsupervised contact with a vulnerable population, including children and/or the elderly, must be appropriately screened prior to providing services under this Contract. The Contractor must check the link for updates to the policy. The Background Check Policy is located here:
<http://www.montgomerycountymd.gov/HHS/DoingBuswDHHS.html>
- J. All Staff who are found to have a verified history of physical abuse, neglect, financial exploitation, or sexual abuse must not provide services under the resulting contract.

5.4 CONTRACTOR'S RESPONSIBILITY

The Contractor must provide the services required by the County based on the Scope of Services stated in this RFP and the resulting contract.

5.5 CONTRACTOR QUALIFICATIONS

The Contractor must be registered to do business in the State of Maryland and have the ability to perform all services as stipulated in this RFP.

5.6 COUNTY'S RESPONSIBILITY

The County will be responsible for processing monthly invoices and monitoring the performance of the Contractor.

5.7 REPORTS/DELIVERABLES

- 5.7.1 The Contractor must develop and maintain the reports described below and submit them to the County when required. The Contractor may develop its reporting forms, subject to the Contract Monitor's approval of the report's format.
- 5.7.2. The Contractor must provide the following reports to the County:
 - 5.7.2.1. A monthly data report - due no later than fifteen (15) days following the end each month, describing the services provided by the Contractor in the reporting month. The monthly report must be a spreadsheet (such as Excel or similar) transmitted electronically to the Contract Monitor with each monthly invoice, detailing activities during the month being billed, to include the number of events held and locations, other outreach activities, number of HO and HS that completed an intake, number of matches in progress, number of matches ongoing, and those matches that failed, by location and zip code.
 - 5.7.2.2. A quarterly narrative report — due no later than fifteen (15) days following the end of each calendar quarter, delineating program activities, statistics, and trends. The narrative report must include descriptions of the following activities including:
 - ii. Publicity and outreach efforts;
 - iii. Status of matches; and
 - iv. Outstanding challenges - aggregate demographic information on clients served, including gender, race, ethnicity, zip code, age, income range, county residency, need for accessible housing.

The quarterly report format must be approved by the Contract Monitor prior to submission.

5.7.3. The Contractor must collect client survey information regarding the Performance Measures set forth below in Section 5.8. of this RFP and report the results to the Contract Monitor no later than 30 days after the end of each contract term.

5.7.4 Records: The Contractor must develop and maintain a County-approved system of written client records for this Program. The Contractor's individual client records must include data in a format to be approved by the County Contract Monitor including, but not limited to:

1. number and type or nature of referrals;
2. assessment tool(s) used at various stages of service, e.g., initial, interim, and final;
3. contact data for clients;
4. service agreement and services plan to include signatures of the family and providers;
5. progress/review dates and data, and bi-monthly progress;
6. reports for, and prepared by, other service providers;
7. signed releases of information;
8. documentation of each client's participation in the program;
9. dates and number of visits, notations of all assessment activities and contact data;
10. type of services and Contractor referrals and follow-up provided;
11. documentation of attempts to work with reluctant families; and
12. discharge summaries.

5.8 CONTRACTOR'S PERFORMANCE MEASURES

The Contractor must work with the County, and within 90 days the execution of the contract resulting from this RFP, develop and refine outcome measures related to the services provided through this RFP, which support achievement of the goals and objectives of the program and the mission of the County.

Contractors' performance will be measured by the following indicators:

- HO and HS reports on improved quality of life because of the match.
- HO and HS satisfaction with the way the Contractor managed the matching process.
- HO and HS satisfaction with the Contractor's ability to support challenges and disputes experienced after the rental agreement was implemented.
- HO and HS satisfaction with the Contractor's ability to provide referrals to other community resources needed to address their housing needs.

6. SECTION C - PERFORMANCE PERIOD

6.1. TERM

The effective date of this Contract begins upon signature by the Director, Office of Procurement. The period in which the Contractor must perform all work under the Contract begins on the Contract's effective date and ends after a one (1) year period. Before this term for performance ends, the Director at his/her sole option may (but is not required to) renew the term. The Contractor's satisfactory performance does not guarantee a renewal of the term. The Director may exercise this option to renew this term two (2) times for up to one (1) year each.

The County Council appropriates funds on a fiscal year basis; the County's fiscal year runs July 1 through June 30. For fiscal year beginning July 1, 2025 and for any subsequent Contract periods, payments under the Contract are contingent upon the appropriation and encumbrance of funds. If the County Council fails to approve an

appropriation to fund this Contract for a fiscal year that begins after this Contract is entered into, this Contract terminates on the first day of that fiscal year without further cost, liability or obligation to the County provided that the Contractor is given thirty (30) days written notice of termination.

6.2 PRICE ADJUSTMENTS

6.2.1 Prices are fixed for the first term of this Contract. For any renewal term of this Contract, a price increase may be allowed as follows:

- a. If the County Council provides for an Inflationary Adjustment that applies to this Contract, the Contractor will receive the Inflationary Adjustment in the amount set forth by Council for the subject Fiscal Year. In this event, the Contractor may not seek any additional price increase(s) during the renewal term.
- b. If there is no Council-approved Inflationary Adjustment applicable to this Contract, the Contractor may request a price increase, subject to the following:

- 6.2.1.1. Approval or rejection by the Director, Office of Procurement, or designee.
- 6.2.1.2. Must be submitted in writing to the Director, Office of Procurement, and accompanied by supporting documentation justifying the Contractor's request. A request for any price adjustment may not be approved unless the Contractor submits to the County sufficient justification to support that the Contractor's request is based on its net increase in costs in delivering the goods/services under the Contract.
- 6.2.1.3. Must be submitted sixty (60) days prior to Contract expiration date, if the Contract is being amended.
- 6.2.1.4. Must not be approved in an amount that exceeds the amount of the annual percentage change of the Consumer Price Index (CPI) for the twelve-month period immediately prior to the date of the request. The request shall be based upon the CPI for all urban consumers issued for the Washington-Arlington-Alexandria, DC-VA-MD-WV, Metropolitan area by the United States Department of Labor, Bureau of Labor Statistics, for ALL ITEMS.
- 6.2.1.5. The County will approve only one price adjustment for each Contract term, if a price adjustment is approved.
- 6.2.1.6. Should be effective sixty (60) days from the date of receipt of the Contractor's request.
- 6.2.1.7. Effective only if executed by written Contract amendment.

7 SECTION D - METHOD OF AWARD/EVALUATION CRITERIA

7.1 PROCEDURES

- 7.1.1. Upon receipt of proposals, the Qualification and Selection Committee (QSC) will review and evaluate all proposals in accordance with the evaluation criteria listed below under Section D.7.1.9.a. The QSC will also review an offeror for responsibility.
- 7.1.2. Vendor interviews will not be conducted.
- 7.1.3. The QSC will make its award recommendation of the highest ranked offeror based on the QSC's written score, and its responsibility determination.
- 7.1.4. The Using Department Head will review and forward the QSC recommendation with concurrence, objection, or amendment to the Director, Office of Procurement.
- 7.1.5. The Director, Office of Procurement, may approve, approve with conditions, or reject the Using Department Head's recommendation.
- 7.1.6. Upon approval of a recommended award to a proposed awardee, by the Director, Office of Procurement, the County will enter negotiations with the proposed awardee. If a contract cannot be successfully negotiated with the proposed awardee, the Using Department will proceed to negotiations