

5. SECTION B - SCOPE OF SERVICES:

5.1. Background

The County requires multilingual and accessible outreach services to low-income County residents with particularly complex needs and/or factors that represent barriers to accessing services to obtain basic necessities (i.e., food, clothing, shelter, and health and mental health care). Services are to be provided to County residents on-site and in collaboration with the Service Consolidation Hubs, Regional Service Centers, and/or co-located partnering organizations operating within Montgomery County and one-on-one case management to provide comprehensive services to residents.

The County seeks to provide case management services in areas where the community is lacking in direct services. The Contractor must divide the case managers' full-time schedules to provide services working physically on site, to collaborate with County services, at a minimum of three (3) Service Consolidation Hubs, Regional Service Centers, and/or partnering organizations' sites such as, but not limited to:

- Up-County areas of Gaithersburg or Germantown;
- Mid-County (such as Rockville, Aspen Hill, and/or Wheaton); and
- Down-County/East County (such as Silver Spring and other areas along Routes 29 and/or 650).

5.2. Intent

The County seeks proposals from qualified, experienced entities to provide outreach services and one-on-one case management services to the target population, Montgomery County individuals, families, and households ("Clients"). The contract resulting from this Request for Proposals (RFP) is projected to provide outreach services for 120 to 150 unduplicated Clients per month from at least three sites across the County in areas of highest need. The resulting contract will also provide one-on-one case management services to, at a minimum, 60 unduplicated Clients per month in collaboration with County services. The Department of Health and Human Services (DHHS) intends to award one contract as a result of this RFP.

The total estimated Fiscal Year 2025 compensation for the contract resulting from this RFP is \$435,802.91. This amount is an estimate only and 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 County Council's appropriation and encumbrance of funding for the program described in this solicitation. 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. Additional services will be added during negotiations or via a contract amendment to the contract resulting from the solicitation.

5.3. Scope of Services/Specifications/Work Statement

- A. The Contractor must provide onsite outreach services, at Service Consolidation Hubs, Regional Service Centers, and/or partnering organizations' site, each week for a monthly total of 120 to 150 unduplicated low-income Clients with particularly complex needs and/or factors that represent barriers to accessing services to obtain basic necessities (i.e., food,

clothing, shelter, and health and mental health care). The Contractor must connect low-income Clients with County and/or partnering organizations' services and resources. On-site outreach services include, but are not limited to:

1. Outreach during food distributions, offering one-on-one assistance by appointment, pre-established walk-in hours, and/or by phone, as appropriate.
 2. Formal assessment of Clients' needs and goals, referrals for services, coordination with other agencies for Client services.
 3. Follow-ups to determine whether Clients' needs are met. The Contractor may provide follow-up services in-person or virtually (e.g., via text, email, or telephone).
 4. Information and referrals for food, clothing, furniture, medical insurance, medical and dental services for the uninsured, immigration resources, summer meal programs, Supplemental Nutrition Assistance Program, The Special Supplemental Nutrition Program for Women, Infants, and Children, rental assistance programs, utilities assistance programs, mental health, programs for elderly residents, childcare, Early Head Start registration, tax preparation and pro bono legal information, and other available services that County residents may need.
- B. The Contractor must provide one-on-one case management services to, at a minimum, 60 unduplicated Clients per month, in addition to referrals and information, as outlined in A.1. – A.4. These Clients may be referred by DHHS, the Service Consolidation Hubs, Regional Service Centers, Montgomery County Public Schools (MCPS) and other partner organizations, or Clients who self-refer during outreach events. One-on-one case management includes, but is not limited to, developing the solutions and strategies for solving Clients' needs by assisting them towards economic mobility and resilience, including focusing on Clients' goals, skills, and assets.
- C. The Contractor must employ multilingual case managers to support the Service Consolidation Hubs, Regional Service Centers, and/or co-located with partnering organizations. The Contractor must provide equitable access to its services for all Clients regardless of the Client's abilities, experiences, knowledge, skills, and strengths, ages, backgrounds, cultures, ethnicities, primary languages, physical abilities, and other attributes. The Contractor must ensure that all written information produced or used by case managers is accessible to Clients with disabilities, and/or language barriers.
- D. The Contractor must provide assistance, in completing and submitting applications for needed services, to low-income residents who experience language, literacy, or technical barriers as outlined in CLAS Standards #5-8 (Attachment G).
- E. The Contractor must divide the case managers' full-time schedules to provide services working physically on site, to collaborate with County services, at a minimum of three (3) Service Consolidation Hubs, Regional Service Centers, and/or partnering organizations' sites such as, but not limited to:
1. Up-County areas of Gaithersburg or Germantown;
 2. Mid-County (such as Rockville, Aspen Hill, and/or Wheaton); and
 3. Down-County/East County (such as Silver Spring and other areas along Routes 29 and/or 650).
- F. Case management coordination with hosting sites (Service Consolidation Hubs, Regional Service Centers, or partners) includes, but is not limited to:

1. Services must be provided on a schedule approved by the County and aligned with the schedule(s) of the hosting sites' services. Weekend or evening service hours may be required, up to twice per month.
 2. The Contractor must collaborate with the staff and leadership at the physical sites of case management services (i.e., hosting sites) to participate in team meetings, and other activities to foster collaboration, trust, and rapport with the community being served.
- G. The Contractor must develop and implement a case management supervision plan, including a description of sufficient supervisory abilities and must be approved by the County.
- H. The Contractor must participate, upon request by the County, in meetings, training opportunities, and other activities.
- I. The Contractor must demonstrate knowledge of current services and programs available, to assist low-income and immigrant residents, offered by other organizations and stay abreast of new services and programs. They must stay aware of changes to those programs to better serve the community and provide referrals to those organizations in addition to services provided by the Contractor.
- J. The Contractor must establish and maintain partnerships and relationships with other organizations that provide case management and related social services in Montgomery County by attending monthly meetings and trainings, sharing ideas and trends observed, resources and best practices, and exchange referrals as needed.

5.4. Contractor's Responsibility

- A. The Contractor must comply with all federal, State, and local laws and regulations governing privacy and the protection of health information, including but not limited to, the Health Insurance Portability and Accountability Act. The Contractor must sign and comply with the County's Business Associate Agreement (Attachment D).
- B. 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:
<https://www.montgomerycountymd.gov/HHS/DoingBuswDHHS.html>
- C. The Contractor must submit monthly invoices for program expenses to the County by the 15th day of each month for services provided in the prior month. Invoices and supporting documentation must be provided in a format approved by the County. All payments will be made on receipt of and acceptance by the County of the monthly invoice and report detailing the Contractor's activities, net 30 days.

- D. The Contractor must ensure coverage and provision of services by competent personnel at all times.

5.5. County's Responsibility

- A. The County will list case management services the Contractor provides on the County's website and call line for information (311 or 240-777-0311).
- B. The County will provide the Contractor access to its Language Line contract for below-market rates for interpretation and translation services.
- C. The County will reimburse for all costs incurred by the Contractor in providing the goods and services described in the contract resulting from this RFP if the compensation does not exceed the Contractor's approved budget and the funds appropriated by the County and encumbered in the County Purchase Order issued to the Contractor. Invoices must be sent to the Contract Monitor designated by the County.

5.6. Reports/Deliverables

- A. The Contractor must submit required data to the County as described below:
 - 1. The Contractor must submit ad hoc reports at the request of the County.
 - 2. The Contractor must submit a monthly progress report, along with a monthly invoice, by the 15th of the month to the Contract Monitor.
 - 3. The Contractor must submit all reports in a format approved by the County.
- B. The Contractor must develop a Client satisfaction survey report, including multilingual Client satisfaction survey report, in collaboration with the County's Contract Monitor and provide satisfaction surveys to all Clients served.
 - 1. Satisfaction surveys must allow Clients to comment on the service(s) provided, including but not limited to the following:
 - a. Number of Clients who received services resulting from a referral from County programs and other community agencies;
 - b. Client comments regarding the quality of services provided;
 - c. Degree to which the services met the Clients' needs as well as expectations;
 - d. Courtesy of the staff; and
 - e. Any other information regarding the quality of services received.
 - 2. Surveys must be dated.
 - 3. All satisfaction surveys must be collected and tabulated by the Contractor and reported with the outcomes to the County's Contract Monitor once a year within 15 days after the end of each contract term.
 - 4. Satisfaction surveys must be available in a minimum of two formats, paper and electronic (such as email, text, or QR code).
 - 5. Case management outcomes to be reported semi-annually, such as:
 - a. Number of Clients and the percent of Clients receiving services whose emergent needs were resolved or referred within 60 days.
 - b. Number of Clients and percent of Clients who avoided an eviction notice at least 90 days after receiving emergency assistance.
 - c. Number of Clients and percent of Clients who developed a workable plan to address their crisis and to prevent returning to the same crisis situation again.

- d. Number of unemployed adults who obtained and maintained employment at a living wage for at least 90 days.
- 6. Case management outcomes are due semi-annually within 15 days after the first six months of each contract term, and 15 days after the end of the contract term.
- C. The Contractor must participate in annual data collection activities and report on performance outcomes for research and program evaluation purposes as required by any funding source. These actions must be consistent with customer confidentiality as regulated by all federal, State, and local laws, regulations, policies, and procedures.
- D. The Contractor must provide an annual demographic data report on the Clients served under the contract resulting from this RFP; this report must be submitted with the year-end invoice, by the 15th of the month following the end of the fiscal year. This report must include Clients' ages, genders, countries of origin, preferred language, education levels, income sources, family sizes and types, and housing status. See Annual Client Demographic Report (Attachment F).
- E. The Contractor's reports, expenditures, and financial records are subject to review or audit by the County or its designated representative.

6. SECTION C - PERFORMANCE PERIOD -

6.1. TERM

The effective date of this Contract begins upon signature by the Director, Office of Procurement and ends on June 30, 2025. Contractor must also perform all work in accordance with time periods stated in the Scope of Services. 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 four (4) times(s) for up to one(1) year each.

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:
 - i. Approval or rejection by the Director, Office of Procurement, or designee
 - ii. 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.
 - iii. Must be submitted sixty (60) days prior to Contract expiration date, if the Contract is being amended.
 - iv. 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-