



DEPARTMENT OF ENVIRONMENTAL PROTECTION

Marc Elrich
County Executive

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Director

**MONTGOMERY COUNTY GOVERNMENT
SOLICITATION AMENDMENT #1
MINI-SOLICITATION #1179827**

January 29, 2025

FOR THE PROCUREMENT OF: Organizational and Human Capital Leadership Development

All solicitation amendments must be acknowledged by the offeror prior to the hour and date specified in the solicitation (as amended) for receipt of offers. **Failure to acknowledge an amendment may be cause to reject the offer.** The solicitation provision entitled "solicitation amendments" is applicable to this amendment. The changes set forth below are hereby incorporated into the above-cited solicitation.

DESCRIPTION OF AMENDMENT

THE FOLLOWING CHANGES ARE APPLICABLE TO THE SOLICITATION:

- A. The due date and time for proposals/bids **HAS CHANGED. The current due date and time has been extended to February 14, 2025, no later than 3:00 pm ET.**
- B. Significant edits have been made to address the questions in Attachment A. Highlighted text has been added, deleted text has been stricken. Please make the following changes to your solicitation packet.
- a. Delete and replace the Cover Page with the attached revised Cover Page
 - b. Delete and replace the Table of Contents, page 2, with attached revised Table of Contents Page.
 - c. Delete and replace Section A, page 4 with the attached revised Section A, page 4 page.
 - d. Delete and replace pages 20, Scope of Work, through page 28, with the revised pages 20 through 28.
- C. Questions and DEP's responses are included as Attachment A.

THERE ARE NO OTHER CHANGES.

NAME OF OFFEROR: _____
(Type or Print)

NAME AND TITLE OF
PERSON
AUTHORIZED TO
SIGN: _____
(Type or Print)

OFFEROR'S
SIGNATURE: _____ DATE: _____

END OF AMENDMENT 1

ATTACHMENT A, QUESTIONS AND RESPONSES

QUESTION 1.

- a) What is the maximum number of leadership staff estimated to be trained and coached?
- b) How many people are currently on your leadership team, and how many people total are senior staff?
- c) Approximately how many leaders do you intend to receive coaching?
- d) How many leaders will be in attendance?

RESPONSE: The maximum number of leadership staff who will receive this training is 25.

QUESTION 2.

- a) What is the preferred location of the leadership retreat? Can Montgomery County Dept. of Environmental Protection provide government facilities to host such a retreat at no cost to the contractor? If no specific retreat location is preferred and no government facilities are available, please provide the maximum distance the retreat venue from the headquarters of the Department of Environmental Protection.
- b) In regards to 'Facilitate full leadership team retreat,' is the contractor solely responsible for coordinating the retreats 100% along with attendees lodging accommodations or is it in partnership with the vendor?

RESPONSE: DEP will provide a local government facility for the retreat at no cost to the Contractor.

QUESTION 3. Will the retreat location have conference room and AV capability? Should the retreat location be able to provide overnight housing and meal accommodations for retreat participants?

RESPONSE: The facility will have conference rooms and AV capability. Overnight housing and meal accommodations are not required for the retreat.

QUESTION 4.

- a) What are the preferred number of days for the leadership retreat?
- b) How many total sessions are there?

RESPONSE: DEP anticipates a minimum two-day retreat that will be held at a Montgomery County Government site.

QUESTION 5. What are the maximum number of coaching hours per leadership staff participant for the program?

RESPONSE: The number of per-person coaching hours will be determined after retreat attendees provide their evaluations of the retreat, at which point DEP will assess further per-person coaching needs and then advise the Contractor accordingly.

QUESTION 6. Does DEP prefer to have training of the leadership skills described in Section 2.1 of the solicitation (e.g., organizational leadership, decision-making, problem-solving, delegation, communication, cultivating positive relationships, resolving conflict, and building high performance teams), occur during the leadership retreat, or is there a preference to have separate workshops on these topics delivered separately from the leadership retreat?

RESPONSE: DEP prefers that these skills be covered in the retreat but may also be addressed during as-needed coaching sessions.

QUESTION 7. Please confirm whether the assessment, coaching, training, and leadership retreat activities can be conducted virtually, or whether such activities must be conducted in person. Specifically, which activities must be conducted in person and which activities can be conducted virtually.

RESPONSE: The facilitated retreat must be in person. Other activities may be conducted in person or virtually as negotiated in the contract. All in-person activities will be held at County facilities at no cost to the Contractor.

QUESTION 8. What is your anticipated timeline / ideal start date for this program?

And could you kindly confirm the expected duration of the project?

RESPONSE: The County will negotiate an acceptable timeline as part of the contract award. Offerors should establish a workplan timeline based on receiving the Notice-to-Proceed (NTP) and Purchase Order (PO). As it's not known when the County will issue the NTP and PO: provide your draft timeline in weeks or months from the project's starting point, rather than specific dates. E.g., "We will complete task X one month from receipt of the NTP, and will complete task Y one week from completion of task X, etc."

QUESTION 9. We are interested in bidding on the subsection solicitation for Organizational and Human Capital Leadership Development services. However, the following requirements on page 24 and 27 of the solicitation seem to indicate that DEP is only interested in bids from Maryland-based companies:

- Page 24-6.a: "All services furnished under this contract shall be from firms that have been in business for at least **five (5) years** and must be currently licensed and insured in the area where the work is to be performed. Failure to provide such proof may result in the firm being determined to be non-responsive and not eligible for award.
- Page 27-F.A.1.a: "A Certificate of Good Standing in the Offerors legal name from the Maryland State Department of Assessments and Taxation (SDAT) that is no more than 30-days old, or a screen print showing the business is good standing that is no more than 30-days old."

Would the DEP consider allowing for bids from a qualified company that is not currently registered in Maryland under the assumption that the company registers within 30 days of contract award. If so, can the company offer a Certificate of Good Standing from its state of origin in lieu of the requirement specified on page 27-F.A.1.a?

RESPONSE: We urge all Offerors not already registered to conduct business with Maryland to do so promptly, as Maryland's review, approval, and upload processes may take several weeks or longer. This process is out of the County's control.

If an Offeror is already registered in SDAT but is not in good standing status, we urge the Offeror to resolve any outstanding issues promptly; as noted above, Maryland's review, approval, and upload processes may take several weeks or longer.

Note that the County will not execute a contract unless and until the Vendor is registered with Maryland SDAT and in good standing status. An out of state Offeror must supply details on the steps it's taking to register with SDAT. The Contract Awardee must be registered and in good standing status with SDAT within 30 days after the Notice of Intent to Award the contract has been posted on the Office of Procurement's website at <https://www.montgomerycountymd.gov/PRO/solicitations/index.html>.

If the Proposed Awardee is not registered with Maryland SDAT and in good standing status by the required deadline, the Proposed Awardee announcement will be rescinded, and the County will either enter into contract negotiations with the second most qualified Offeror, may cancel the solicitation and not award any contract.

The County will accept licensure from an out of state Vendor's home state. The Mandatory Insurance Requirements are not impacted by the Offeror's home state.

QUESTION 10. "The solicitation mentions that vendors must 'assist DEP in reaching its goals of ensuring leadership staff...'

- a) Could the County clarify which leadership tiers will benefit from this program (e.g., division heads, executives, managers, front-line supervisors)?
- b) Additionally, how many leaders does the County anticipate training and coaching as part of this program?
- c) How many coaching sessions does the County anticipate each individual leader will receive under this program?"

RESPONSE:

- a) The initial group will be the Managerial Leadership Team
- b) Refer to Question #1 and the response.
- c) Coaching will be as-needed.

QUESTION 11. "Under Project Specifications, bullet #2, the County mentions that it desires an 'Integration of the 360 Evaluation tool and results with the virtual coaching platform.'

Could the County specify if there is a particular platform that vendors are required or preferred to use?"

RESPONSE: No, there is no current platform. This requirement has been stricken from the solicitation.

QUESTION 12. "Bullet #4 of the Project Specifications states that vendors are to 'Facilitate full leadership team retreat to achieve strategic goals stated in Section 2.1.'

- a) Could the County clarify the desired duration of the leadership team retreat?
- b) Does the County prefer the retreat to be conducted in-person, virtually, or offer flexibility between both formats?
- c) If in-person, does the County prefer onsite or offsite retreats and if offsite, is the contractor responsible for securing the venue?"

RESPONSE:

- a) The leadership team retreat is expected to be a minimum of two days
- b) The retreat must be conducted in-person.
- c) The County will coordinate the location of the retreat facility. It will be in Montgomery County.

QUESTION 13. "Bullet #3 of the Project Specifications requires vendors to produce a 'demonstration of the virtual platform – provide links or screenshots (those invited to oral presentations must conduct a live demonstration).'

Could the County confirm whether links or screenshots are required as part of the initial proposal submission or in addition to the oral presentation? "

RESPONSE: In order to evaluate the written proposal, screen shots are preferred. If an Offeror is offered an interview, a demonstration of the virtual platform will be expected.

QUESTION 14. "Under staff qualifications, the County states, 'When appropriate, provide a sample of virtual platform designs created by the individual...'

Could the County clarify what is meant by 'virtual platform designs'?"

"Under the firm's qualifications, the County requests vendors to 'provide information about the length of time the firm has been providing website redesign services, as well as any other services that may be provided by the firm.'

Could the County confirm whether this requirement is applicable to this solicitation, given its focus on leadership development and coaching?"

RESPONSE: See attached revised pages, we have stricken those requirements.

QUESTION 15. "Similarly, under the firm's qualifications, the County asks vendors to 'provide information about the number and size of government institutions that have utilized the workshop event management services of the firm in the past three (3) years.'

While our clients have managed outreach and registration for courses over the past three years, we have over 8–10 years of experience independently handling outreach, registration, and course logistics for virtual and in-person training on various topics across multiple regional offices. Would the County allow us to include this broader experience to demonstrate our qualifications?"

RESPONSE: No.

QUESTION 16. What does success look like for this project?

RESPONSE: Review Section D, Scope of Services.

QUESTION 17. Does the project represent a continuation of a past or current effort or is this a new initiative? If you have used a similar process in the past, what parts do you wish to retain, and which parts do you wish to improve or discard?

RESPONSE: This is the first time we are soliciting for these services.

QUESTION 18. Do you have an incumbent who provides similar services to those described in the RFP? If yes, what advantage, if any, would such a vendor have in competing for the current project? What was most and least useful about the experiences?

RESPONSE: No. There is no incumbent.

QUESTION 19. What is your not to exceed budget or budget range or how much have you spent on similar work in the past?

RESPONSE: The maximum value of this contract will not, under any circumstances, exceed \$99,999. See paragraph D.5.

QUESTION 20. What is your estimate of the number of retreats that will be held?

RESPONSE: One.

QUESTION 21. How many leaders do you anticipate attending the retreats, and participating in coaching? What are the participants' positions/titles?

RESPONSE: See the response to Question 1.

QUESTION 22. What is your preferred modality for meetings (in-person, virtual)? Will all meetings be conducted using the same modality?

RESPONSE: Refer to the header “Meetings” in Section D, Scope of Services.

QUESTION 23. If there is a face-to-face trainer/facilitator, can there also be a virtual trainer/facilitator?

RESPONSE: Refer to the header “Meetings” in Section D, Scope of Services.

QUESTION 24. In your RFP you mentioned “Detail the training that will be provided to County staff and administrators on the utilization of the virtual platform and in-person.” Please share more information about virtual training needs. For example, do you need off the shelf virtual training courses? Do you require any associated certifications?

RESPONSE: The training methods used by the Offeror must be included in the Proposal. Provide applicable certifications to be considered in the Offer.

QUESTION 25. What is your preferred timeline from program kick-off to final retreat?

RESPONSE: See Section D, paragraph 5 under “Schedule”.

QUESTION 26. Do you have a preference for local consultants, or any other preferences?

RESPONSE: This solicitation is not Local Small Business Reserved. Any qualified Vendor can submit and offer.

QUESTION 27. Why are you choosing to outsource this project rather than staffing it internally?

RESPONSE: We don’t have the personnel to conduct this training.

QUESTION 28. What are your key business initiatives?

RESPONSE: We are a government organization. Review our website for information on our programs.

QUESTION 29. Who do you consider your key competitors? (for strategic planning bids and some others)

RESPONSE: We are a government organization.

QUESTION 30. Will answers to questions from all potential vendors be shared among them?

RESPONSE: Yes.

QUESTION 31. Will we be able to learn who the other bidders are?

RESPONSE: No.

QUESTION 32. In our proposal, may we include references and hyperlinks to electronic resources, e.g., to web pages?

RESPONSE: The written proposal evaluations will only be based on the information that is submitted. We will not click links or reference electronic resources for the written evaluation. During the interview, Offerors can present their on-line platforms and resources.

QUESTION 33. Team Requirements: Is this contract designed to be executed by an individual consultant, or does DEP anticipate a team-based approach with multiple facilitators and support staff?

RESPONSE: The Prime must perform a minimum of 51% of the services performed.

QUESTION 34. Expected Volume of Work: How many management staff members will be participating in the program?

RESPONSE: See response to Question 1.

QUESTION 35. Program Delivery: Does DEP have a preference for in-person sessions, virtual delivery, or a hybrid format?

RESPONSE: Refer to the header “Meetings” in Section D, Scope of Services.

QUESTION 36. Content Development: Will DEP provide any existing materials or assessments to build upon, or will the contractor be responsible for creating all training content from scratch?

RESPONSE: No, the Contractor will be responsible for creating the training content.

QUESTION 37. Time Commitment: Could you provide an estimate of the anticipated hours per week or the overall timeline to complete the program?

RESPONSE: No, the estimated time commitments must be included in the proposal. Some elements, such as coaching, will be as-needed services.

QUESTION 38. Additional Requirements: Are there any administrative or reporting responsibilities (e.g., detailed progress reports, post-training evaluations) that I should consider?

RESPONSE: Please read the Section D, Scope of Services, carefully.

QUESTION 39. On page 21, there is a mention of Virtual coaching. By “virtual coaching”, do you mean Coaching conducted remotely via teleconference and/or video conferencing platforms?

RESPONSE: Refer to the header “Meetings” in Section D, Scope of Services.

QUESTION 40. On page 21, there is also a mention of “coaching platform”, Does that refer to the video-conferencing platforms that may be used by a coach or is the County looking for a more specific platform?

RESPONSE: We currently do not have a platform. The Offeror must provide information on the platform they would use if awarded a contract.

QUESTION 41. How many vendors will be selected for this effort?

RESPONSE: One.

QUESTION 42. How many participants are expected to go through assessments? Is there a preference on the 360-assessment tool?

RESPONSE: See response to Question 1. There is no preference on an assessment tool.

QUESTION 43. How many members are part of the executive team and senior staff?

RESPONSE: See response to Question 1.

QUESTION 44. There are references to a retreat under 2.0 Scope of Services but there is no mention of a retreat or related activities under Project Specifications. Can you define what role the contractor will have with the retreat, i.e., are we supporting the event (logistics, notes, etc.) or are we designing and implementing the retreat (and if so, all of the retreat or just assigned portions)? Also, how many retreats are anticipated over the period of performance and what is the estimated length of the retreat?

RESPONSE: See responses to questions above.

QUESTION 45. What are the number of employees in executive leadership and senior staff?

RESPONSE: See response to Question 1

QUESTION 46. In the RFP, it is mentioned to detail the training that will be provided to County staff and administrators on the utilization of the virtual platform and in-person. We understand the training has to be provided on the utilization of the virtual platform. What are the other topics that the DEP is looking for the in-person trainings? Is the coaching preferred to be onsite or virtual?

RESPONSE: Offerors should propose the topics and methodologies they would use for the in-person workshop. Coaching sessions would either be in-person or virtual, these can be coordinated with staff.

QUESTION 47. In the SECTION E. METHOD OF AWARD/EVALUATION CRITERIA under Firm's qualification - Provide information about the number and size of government institutions who have utilized the workshop event management services of the firm in the past three (3) years. Could you please explain.

RESPONSE: Provide examples and details of the government institutions the Offeror has worked with in the past three (3) years and how the event was successfully managed.

QUESTION 48. I would like to clarify whether the Minority, Female, Disabled Person Subcontractor Performance Plan requires formal approval from Avinash Shetty, Director of the Office of Procurement, prior to submission, or if we are simply required to outline and submit our plan of action.

RESPONSE: Please contact the Division of Business Relations and Compliance (DBRC) MFD Program Manager, Alvin Boss, at 240-777-9912, or by email at mfd@montgomerycountymd.gov to receive clarification on your question.

Remainder of Page Intentionally Left Blank

Revised Solicitation Pages Follow



INFORMAL MINI SOLICITATION #1179827
Organizational and Human Capital Leadership Development

ISSUE DATE:	January 21, 2025	INSERT DATE ONLY
SUBMISSION DEADLINE:	February 14, 2025, no later than 3:00 pm ET	INSERT DATE/TIME

February 5, 2025, no later than 3:00 pm ET

The Montgomery County Department of Environmental Protection is soliciting bids for ***Organizational and Human Capital Leadership Development***. Bids must be submitted no later than the date and time listed above. If a bidder is interested in submitting a bid but cannot make the submission deadline, the bidder must call/email the Department of Environmental Protection at dep.procurements@montgomerycountymd.gov (preferred), or by phone at 240-777-7787, to see if an extension may be granted.

The following pages contain the terms, conditions and scope of services for this Informal Solicitation.

One original of your proposal must be submitted to the DEP Contracts Team electronically to dep.procurements@montgomerycountymd.gov. Proposals will **not** be accepted in person or by hard copy.

Should you have any questions regarding the information, or the scope of services contained in this solicitation, contact DEP Contracts Team at dep.procurements@montgomerycountymd.gov (preferred) or phone at 240-777-7787.

Bids/Offerors will only be accepted in an electronic format either as an Adobe® PDF (preferred) document or as a Microsoft® Word document. Offers MUST be submitted by e-mail to DEP.Procurements@montgomerycountymd.gov and they must be received no later than the proposal due date and time shown above.

- The maximum file size that can be submitted is 30 Megabytes, therefore, Offerors must ensure the bid/offer file is compressed to reduce the file size below that threshold. This includes, but is not limited to, compressing all images and deleting any cropped areas, flattening layered images, and optimizing image quality to reduce their size, PDF files should be compressed before sending.
- Bidders/Offerors must ensure the file is not too large for their mail server to transmit as well.
- The e-mail submission of a link to download a larger file (Dropbox, SharePoint, OneDrive, etc.) will not be accepted.
- It is the Bidders/Offerors responsibility to ensure the transmission of the bid/offer has been successful. When a bid/offer is received, a reply will be sent confirming receipt of the bid/offer within one business day. Use the contact information above to contact the DEP Contracts Team if you do not receive a confirmation.
- If the Bidder/Offeror uses a non-Adobe® PDF-making product, it is the Bidders/Offerors responsibility to ensure the file is readable by Adobe® Reader, a free program provided by Adobe. If the Bid/Offer documents are not readable or are incomplete (e.g., form field contents do not display in the Adobe product) the bid/offer will be deemed non-responsive and will be rejected. It is recommended that users print the document or file from the non-Adobe product to the PDF Printer to flatten the file and remove any form fields.

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- b. The County will not pay any mark-up or fees on ODC's (Other Direct Costs) other than those stated above. Costs must not include any Federal, State, or Local taxes; any taxes incurred are the sole responsibility of and must be paid by the Contractor.

11. DEPARTMENTS AUTHORIZED TO USE CONTRACT(S)

The primary user of the Contract is the Department of Environmental Protection. This agency is authorized to use its own internal Job Release System and Financial Department methods. All other potential users of this Contract must route their usage through the Contracting Officer, or designee. **Contractors are cautioned not to perform work for any other Department other than the primary using Department without written authorization from the Director, Office of Procurement.**

SECTION D. SCOPE OF SERVICES

1. BACKGROUND

DEP requires strategic executive ~~coaching and~~ development services to work with its leadership team to create an organization that is strategic, innovative, sustainable, and maximizes human capital to ensure DEP's leadership is best positioned to successfully lead our staff and to strengthen partnerships internally and externally.

The purpose of this Informal Solicitation is to obtain consulting services with ~~coaching and~~ **executive** development for DEP's management staff to receive training and education to maximize growth in leadership, expand management skills with programs and staff, and identify and cultivate the next generation of DEP leaders.

DEP's Roadmap ([Attachment D](#)) identifies the areas of focus to ensure DEP remains a leader in the County, region, and nation in program initiatives, as well as a focus on human capital programs to ensure staff has growth and promotional opportunities. The Roadmap lists as a key objective the provision of coaching and leadership development to empower staff with the skills, support, and confidence to reach our goals.

DEP also has a Training and Career Development Policy to ensure that all staff have opportunities through their performance plans to identify goals for career growth, and training that will help meet those goals.

Further, DEP has a Succession Planning Model to recognize critical positions for which we need to have a successor identified in case of retirement or departure of the incumbent. This Model will help identify and mentor staff for growth into higher level positions while in an 'acting' capacity, providing potential to move into those positions permanently.

NOTICE TO VENDORS: No work may begin until the County has issued a Purchase Order and a Notice to Proceed to the Contractor.

2. SCOPE OF SERVICES

The Contractor must assist DEP in reaching its goals of ensuring leadership staff is poised to increase their effectiveness, cultivate positive relationships, employ successful conflict resolution techniques, and decisively manage change and innovation. This Contractor must over the course of this contract:

1. Provide strategic executive consultation on leadership and strategy to drive identified outcomes as identified by the County. Outcomes must include, but are not limited to:

- a. Developing common understanding of alignment and collaboration among Department's leaders.
 - b. Developing leadership skills and increasing effectiveness, including strengthening skills in organizational leadership, decision making, problem solving, and delegation.
 - c. Enhancing communication skills.
 - d. Cultivating positive and effective relationships.
 - e. Successfully managing and resolving conflict.
 - f. Building collaborative and impactful high-performance teams.
2. Provide individual assessments for executive leadership and senior staff to inform assessment of the current status and opportunities to improve performance of team.
 3. Facilitate senior leadership team review of assessments and planning for full leadership team retreat.
 4. Facilitate full leadership team retreat to achieve strategic goals stated in Section 2.1
 5. **Provide a post-facilitated leadership retreat report with a roadmap for follow-up actions** ~~Provide executive coaching for executive leadership and senior staff to facilitate implementation and momentum as established in leadership retreat.~~

~~All sessions must include agendas developed in coordination with the Contract Administrator and provided for their review, edits, and final approval at least two weeks before each session. Agendas must include action items intended to facilitate specific behaviors and actions.~~

~~The Contractor must provide recommendations on individual coaching needs to reinforce areas of competency needed for improvement.~~

PROJECT SPECIFICATIONS

The following project specifications outline the County's requirements. Proposals for the executive ~~coaching~~ **leadership** project should include or account for the following:

The vendor selected for the executive ~~coaching~~ **leadership** services shall develop and design the program format, content and suggest outcomes, assist the County in stakeholder communications as well as refining the requirements of the project based upon needs assessment and their extensive knowledge of resources and the current landscape.

Refer to the Schedule in paragraph 5.a for the expected timeline of these activities.

Kick Off Meeting

The Contract Administrator will coordinate with the Contractor to schedule a kickoff meeting. At the County's sole discretion, meetings may be held via phone or on-line, e.g., via Microsoft® Teams.

360 Evaluation

1. ~~Assessment Tool: An online 360 evaluation tool that can be customized to meet the specific needs of the County, and the evolving leadership needs of the organization. The assessment tool must measure employee competency based on feedback from multiple people across the organization, to generally include the person's direct manager, colleagues on the same team or department, colleagues from a different team or department, direct reports (if applicable), and a senior leader (or multiple senior leaders, depending on level). Feedback should allow participants to rate the individual according to their current job-related skills, leadership, and how well they exhibit organizational core values.~~

- ~~2. Integration of the 360 Evaluation tool and results with the virtual coaching platform is highly desired but not required. If the 360 Evaluation tool is not integrated into the coaching platform, the Vendor must provide a clear and detailed explanation as to how the administration, results and integration of the 360 assessment results will be integrated into the coaching services. An explanation must include procedures and safeguards for ensuring confidentiality of this information.~~

Initial Assessment

1. Evaluate current leadership team perspectives: Conduct interviews and review materials to understand the department's vision, priorities and potential obstacles to maximizing effectiveness.
2. Conduct assessment of leadership team working style: Utilize an assessment tool to determine working and personality traits for the leadership team to allow for constructive feedback and identify areas for shared improvement. The assessment tool that can be customized to meet the specific needs of the County, and the evolving leadership needs of the organization. leadership retreat is required.

Retreat – Facilitate an in person retreat at the County's selected facility for leadership staff that integrates the results of the assessment tool, and creates a shared vision for improving the effectiveness of the team and department performance.

Post Retreat - A post-facilitated leadership retreat report with a roadmap for follow-up actions no later than 4 weeks after completion of the retreat. Follow up actions may include additional working sessions, employee coaching or other activities as recommended.

Executive Coaching

- ~~1. Coaching: The provision of coaching services with clients in a thought provoking and creative process that inspires them to maximize their personal and professional potential. The executive coaching must provide a safe, structured, confidential and trustworthy environment in which to offer support for the individual. Coaching must help employees understand their current competencies, see how they're perceived by others, and focus on identifying and clarifying current goals as well as the appropriate action steps to reach those goals.~~

~~The Vendor must demonstrate the availability of a diverse pool of certified coaches with 5 more years of experience in higher education, management, supervision, leadership or related fields.~~

Support

1. Communications: Provide resources and subject matter content that can be used to promote interest and to help the County build awareness and gain participation from employees.
2. Technical Assistance: User training and technical support on aspects of platform usage throughout the period of performance.
3. Consultant services: Vendor will consult the County on best practices and options for an effective employee coaching and leadership development program to include but not limited to incentives and employee support services. Post project implementation, Vendor will meet (virtually or in person) with designated County administrators no less than monthly on dates/times to be mutually agreed, to discuss project needs and progress.

Proposals may list additional services not listed above as separate and optional with associated costs delineated for each optional service.

Meetings

The Contract Administrator will coordinate with the Contractor to schedule a kickoff meeting and monthly meetings, unless otherwise scheduled by the Contract Administrator, to check on the progress of work, and to review/tweak per the County's requirements. At the County's sole discretion, meetings may be held via phone or on-line, e.g., via Microsoft® Teams.

3. CONTRACTOR RESPONSIBILITIES

- a. The Contractor must maintain its business in "good standing" with the State of Maryland Department of Assessments and Taxation Business Services, <https://dat.maryland.gov/businesses/Pages/default.aspx>, at all times during the performance of the Contract.
- b. The Contractor must maintain and update, as applicable, the Contractor's information in the County's Central Vendor Registration System (CVRS) at <https://www.montgomerycountymd.gov/PRO/news/NewCVRS.html> within 15 days of any changes. This includes any Automated Clearinghouse (ACH) changes for payment deposits that can only be updated through the CVRS system by the Contractor.
- c. The Contractor must notify the County within 15 days of any changes in the company name (including "dba" changes), address, and/or Tax ID changes. The e-mail to submit this information is DEP.Procurements@montgomerycountymd.gov.
- d. The Contractor must furnish a current Certificate of Insurance (COI) that complies with the requirements in Attachment C to this solicitation before execution of the Contract. The ACORD form, or equivalent, must be provided to the County for Risk Management review and approval. COI renewals must be submitted within 15 days of expiration to DEP.Procurements@montgomerycountymd.gov. If the Contractor's Certificate issuer permits, it is recommended that the Contractor add the DEP Procurements e-mail to a direct-distribute list so DEP will receive COI renewals directly from the broker.
- e. The Contractor must notify the County of any key personnel changes a minimum of 15 business days before the change occurs.
- f. The Contractor is responsible for the entire performance under the Contract regardless of whether the Contractor itself performs. The Contractor is the sole point of contact concerning the management of the Contract, including performance and payment issues. The Contractor is solely and completely responsible for adherence by the Contractor Parties to all applicable provisions of the Contract.
- g. The Contractor is expected to be able to work closely with other County staff.

4. COUNTY RESPONSIBILITIES

- a. Contract Administrator - The County will designate a Contract Administrator to oversee the Contract. The Contract Administrator will monitor the Contractor's adherence to the terms and conditions of the Contract and provide direction for County staff overseeing the work.
- b. Except as prohibited by law, the County will permit the Contractor reasonable access to records and other information within the custody of the County which are necessary for the performance of the work.
- c. The County will provide timely feedback to the Contractor; and will give prompt written notice to the Contractor if the County observes or otherwise becomes aware of any fault or defect in services being provided for, or of nonconformance with Contract requirements.

5. REPORTS/ DELIVERABLES

The following deliverables will be produced by the vendor:

1. Project management framework including timelines, milestones, scheduling, and strategy for stated goals and outcomes.
2. Provide an overall strategy and recommended actions for a successful executive ~~coaching~~ **leadership** program implementation.
3. Demonstration of the virtual platform – provide links or screenshots (those invited to oral presentations must conduct a live demonstration).
4. Evidence of robust **leadership trainer(s)** ~~certified coach roster~~.
5. Training plan for **leadership staff** ~~staff and administrators~~.
6. Communications tools and resources to incent participation and progress to include participant and supervisor surveys and vendor engagement plans.
7. Analytics and tools available for evaluating and supporting the progress of employees.
8. Technical assistance and support throughout the entire scope of the project.

All design work, development, and/or concepts created to be utilized by the County for the purpose of this project are the County's intellectual property.

a. Schedule:

- 1) The kickoff meeting, and additional meetings if required by the County, must occur as required by the Contract Administrator in coordination with the Contract awardee. DEP's intent is to schedule the kickoff meeting within 2 weeks of Contract execution with the awardee.
- 2) The Contractor must provide a detailed work plan and schedule for the Contract Administrator approval ~~draft of the final report must be submitted to the Contract Administrator no later than 8~~ **within two** weeks after completion of the ~~assessment sessions~~ kickoff meeting. The Contractor's response to the County's comments on the ~~draft report~~ **work plan and schedule** must be provided by two weeks from receipt of County's comments. ~~Final report must be provided by two weeks from receipt of County's approval of the report as being final.~~
- 3) A post-facilitated leadership retreat report with a roadmap for follow-up actions no later than 4 weeks after completion of the retreat.

The Contract and all related schedules, once finalized, must not be changed unless otherwise authorized in writing by the Contract Administrator.

The Contractor must not Work on County Holidays or when the County facilities are closed unless authorized by the Contract Administrator or designee. County Holidays are defined by MCPR 2001, Section 24-2:

https://www.montgomerycountymd.gov/HR/Resources/Files/Regulation/MCPR_SECTION_24.pdf.

The initial work under this Contract must be completed by fourteen months from receipt of the Notice to Proceed and Purchase Order. Follow-on work will be authorized on an as-needed basis, not to exceed \$99,999.99.

6. CONTRACTOR'S QUALIFICATIONS

- a. All services furnished under this contract shall be from firms that have been in business for at least **five (5) years** and must be currently licensed and insured in the area where the work is to

be performed. Failure to provide such proof may result in the firm being determined to be non-responsive and not eligible for award.

- b. Documented human capital management and leadership skills with assisting organizations on how to handle the complex challenges of attracting, developing, and retaining top talent to create a sustainable competitive advantage.
- c. Documented understanding on who and how to hire, how to engage and lead their talent successfully, and how to ethically manage the rapidly changing landscape around globalization, diversity, and change.

7. INFORMATION SECURITY

The Contractor must use commercially responsible efforts to ensure that the County's information resources, including electronic data assets, are protected from theft, unauthorized destruction, use, modification, or disclosure as deemed necessary under the County's Information Resources Security Procedure (AP 6-7). To the extent the County has access to the County's network, the Contractor must adhere to the County's Information Resources Security Procedure (6-7).

SECTION E. METHOD OF AWARD/EVALUATION CRITERIA

a. PROCEDURES

- a. Upon receipt of proposals, the Department of Environmental Protection's Evaluation Committee (EC) Subject Matter Experts (SME) will review and evaluate all proposals in accordance with the evaluation criteria listed below. The SME will also review for responsibility.
- b. Vendor interviews will be conducted. Interviews may be conducted at DEP's offices in Wheaton or Derwood, or via Microsoft® Teams, at the County's sole discretion.
- c. The EC/SME will make its award recommendation of the highest ranked offeror based on the written score and interviews and its responsibility determination.
- d. The County reserves the right to negotiate with the Contractor for any labor categories, number of hours, or any other items included in the proposal.
- e. After the successful conclusion of negotiations, the using department will forward the contract to the Director, Office of Procurement will execute the awarded contract.
- f. The County reserves the right to not award this Contract.

b. EVALUATION CRITERIA

a. Written Proposal Requirements and Evaluation Criteria	Max Points
<p>Please submit a <u>maximum</u> of 40 electronic pages total;</p> <p>County-required forms and documents are not included in the page limits.</p> <p>Fonts must be no less than 10pt, the font is not specified, margins must not be smaller than 0.5 inches, page sizes are not specified.</p>	
<p>a. STAFF QUALIFICATIONS</p> <p>Identify and provide detailed resumes for all consultants who will work on the contract. Information for each person shall include their educational background, certifications, and work experience with the proposing firm, as well as any positions with prior employers. Provide a description of the role each individual will play in the project and the approximate amount of time that will be spent. Include specific detail for any experience with work performed for a government institution. When appropriate, provide a sample of virtual platform designs created by the individual. It should be noted that the County does not want the entire portfolio for each individual. Examples</p>	30

a. Written Proposal Requirements and Evaluation Criteria	Max Points
<p>should be used sparingly and only to demonstrate a particular qualification of an individual. The team should clearly demonstrate experience comparable to that required to successfully execute the work described in this solicitation.</p> <p>Additionally, Vendors shall designate a project coordinator who will be the primary liaison with the County, including name, contact information and position with firm.</p>	
<p>b. FIRM'S QUALIFICATIONS Provide detailed information about the following items relating to the firm's qualifications and relevant experience, including, but not limited to the following:</p> <ol style="list-style-type: none"> 1) Provide a company overview, including size, revenue, services provided, and business outlook. Provide detailed information about the number of employees involved in direct support on projects. Provide information about the length of time the firm has been providing website redesign services, as well as any other services that may be provided by the firm. 2) Provide information about the firm's business and customer service philosophy. 3) Provide information about the number and size of government institutions who have utilized the workshop event management services of the firm in the past three (3) years. 4) What is the average duration of a client relationship? 5) How many new clients has your firm added in the past year? 6) How many clients have terminated services in the past year? Why? 7) Is there any pending litigation against your firm? If so, please describe. 8) Are there any significant changes expected in your firm's client base or company operations that would affect your firm's ability to provide services to the County? 	30
<p>c. EXECUTIVE COACHING AND LEADERSHIP DEVELOPMENT EXPERIENCE Provide information that demonstrates your firm's experience with executive coaching and leadership development.</p>	30
<p>d. WORK PLAN Provide a description of the approach that will be taken to ensure that the services are provided as required. Describe your methodology and approach to collecting necessary information. What information will the County need to provide and in what format? Indicate the various MLS staff that would be expected to participate in the project, their roles and the type of information they would be providing, and the estimated level of effort involved for these staff. Describe the quality control system that will be implemented to provide effective measures to ensure that the work performed meets the requirements of the project and is executed to the highest professional standards.</p> <p>Include a project timeline including important project milestones.</p>	40
<p>e. TRAINING Detail the training that will be provided to County staff and administrators on the utilization of the virtual platform and in-person. What will be the topics covered in the training? How will training be provided? Who will be providing the training? Are training materials able to be reproduced?</p>	20

a. Written Proposal Requirements and Evaluation Criteria	Max Points
f. LICENSES The firm and its employees and sub vendors, if any, must have all necessary current business and professional licenses issued by the State of Maryland for the appropriate specialty. Proper documentation shall be attached to the Offer. Provide a copy of the firm's applicable license issued by the State of Maryland.	10
g. INFORMATION TO BE INCLUDED IN THE FEE SCHEDULE (Attachment A is a sample format) The Fee Schedule shall provide the total project cost. Additionally, provide detailed line-item costs for the different components and phases of the project. All hourly rates and fees, charges, and costs shall be clearly stated. The more detail in how you arrive at a proposal cost will be considered in our evaluation.	20
h. MFD Participation* (Must EXCEED set % goal of applicable purchasing category)	20
TOTAL for Written Proposal	200

b. Interview Evaluation Criteria	Max Points
a. Discussion of Contractor's understanding of, and approach to, the work.	25
b. Discussion of experience relative to the Contract.	20
c. Discussion of written proposal.	25
d. Discussion of costs.	20
e. MFD Participation* (Must EXCEED set % goal of applicable purchasing category).	10
TOTAL for Interview	100
TOTAL Maximum Possible Score from Written and Interview Evaluation	300

*MFD Participation Requirements and Examples:

www.montgomerycountymd.gov/PRO/Resources/Files/SolForm/MFDCriteria.pdf.

SECTION F. SUBMISSIONS

- A. Offerors must submit their proposal in the format below. Written proposals will be evaluated on only material that is submitted. The offeror must submit sufficient information to enable the Evaluation Committee to evaluate the offeror's capabilities and experience. Proposals must include the following information:
1. A cover letter with a brief description of the business entity, including the offeror's name, address, telephone number, and email address. Along with the following documentation that are not part of the page maximums listed above:
 - a. A Certificate of Good Standing in the Offerors legal name from the Maryland State Department of Assessments and Taxation (SDAT) that is no more than 30-days old, or a screen print showing the business is good standing that is no more than 30-days old.
 - b. The Offeror's Central Vendor Registration System registration, including uploading the Federal Form W-9: Use address/link: <https://www.montgomerycountymd.gov/PRO/news/NewCVRS.html> to register. Either a confirmation of registration e-mail or a printout of the registration is acceptable. Neither form or printout in paragraphs "a" or "b" may be more than 30 days old.

- c. A completed W-9 form with their bid and marked confidential. A copy of this form can be downloaded from <http://www.irs.gov/pub/irs-pdf/fw9.pdf>.
- d. The name on the Bid, the W-9 form, the CVRS registration, and the SDAT status must be the same true and legal firm name and address.
2. The completed Acknowledgement Page of this solicitation, signed by a person authorized to bind the offeror to the proposal.
3. At least three references that may be contacted to attest to the quality and timeliness of the offeror's work of similar nature and scope as that required by the County in this solicitation. (Attachment C)
4. The offeror must submit the appropriate Wage Requirements Law forms (PMMD-177, see #3 below Web-links).
5. Minority, Female, Disabled Persons Subcontractor Performance Plan (PMMD-65, see #2 below Web-links).
6. Offerors Proposal documenting the requirements that correspond to the written evaluation criteria listed in the Written Proposal Requirement and Evaluation Criteria section.

WEB-LINKS FOR DOCUMENTS AND FORMS

1. Central Vendor Registration System, <https://www.montgomerycountymd.gov/PRO/news/NewCVRS.html>.
2. Minority, Female, Disabled Person Subcontractor Performance Plan and Sample MFD Report of Payments Received, www.montgomerycountymd.gov/PRO/Resources/Files/SolForm/PMMD-65.pdf, www.montgomerycountymd.gov/PRO/Resources/Files/SolForm/PMMD-97.pdf.
3. Wage Requirements for Services Contracts Addendum and Wage Requirements Certification Form and 501(c)(3) Nonprofit Organization's Employee's Wage and Health Insurance Form, www.montgomerycountymd.gov/PRO/Resources/Files/SolForm/PMMD-177.pdf.

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