

5. SECTION B - SCOPE OF SERVICES:

5.1. **Background**

Montgomery County, Maryland (hereafter, the County) manages four (4) business innovation centers as part of its Montgomery County Accelerator Network. These centers have fostered the success and growth of multiple technology startups for decades. In addition to these innovation centers, the County is supporting the development of a technology innovation ecosystem which includes other nonprofit and private sector incubators in the County to foster technology-based economic development through the commercialization of innovative technologies.

It is the County's goal to ensure the four (4) Montgomery County Accelerator Network centers offer a full menu of resources and support services to their tenants, including business consulting, educational programming, networking opportunities, legal and accounting resources, intellectual property and commercialization assistance, preparation for and access to private, state and county funding programs to support their business growth. Below is a list of the four (4) innovation centers and their primary focus.

Germantown Innovation Center (GIC)

20271 Goldenrod Lane

Germantown, Maryland, 20874

Primary Focus: Life Sciences and Advanced Technologies

Rockville Innovation Center (RIC)

155 Gibbs Street, Fourth and Fifth Floor

Rockville, Maryland 20850

Primary Focus: MedTech and other High-Tech

Montgomery County AI Innovation Center (MCAI)

11300 Rockville Pike, Suite 680

Rockville, MD 20850

Primary Focus: Artificial Intelligence (AI) related technologies

Silver Spring Innovation Center (SSIC)

8070 Georgia Avenue

Silver Spring, Maryland 20910

Primary Focus: All industries

Please see Attachment D: Innovation Center Floor Plans for details regarding each Innovation Center.

5.2. **Intent**

The intent is for the County through its Office of the County Executive, Business Center team to enter into a contract with a qualified contractor to strengthen and manage all aspects of Montgomery County Accelerator Network's four (4) innovation centers (i.e. facility management, community building, startup support, technology assistance and commercialization, mentoring services, equipment utilization coordination, international business education and soft-landing support), and to strengthen the County's technology innovation ecosystem by making as many of these resources available not only to Montgomery County Accelerator Network tenants but also to other technology innovators located in Montgomery County.

5.3. Scope of Services

The selected contractor must oversee the day-to-day operations and strategic development of multiple County-owned innovation spaces within the Montgomery County Accelerator Network, including wet labs, nanofabrication and prototyping spaces, offices, meeting/training rooms and coworking environments.

In addition, the selected contractor must manage all programing including the coordination of tenant technology innovation support services, County-wide ecosystem building programs, accelerator programs and other business growth support services (e.g. one-on-one and cohort training, networking, information, and showcase/pitch events) in a branded fashion to benefit technology innovation entrepreneurs throughout the County's technology innovation ecosystem.

The Scope of Services includes, but is not limited to the following:

5.3.1. Facility Management

5.3.1.1. Facility Management – Day to Day Operations of Each Innovation Center

Facility Management includes oversight of all maintenance and repairs required to ensure the facility is in good working condition; implementation of security and safety measures to protect the premises and occupants; energy management; space management; management of all related facility-related invoices and accounting; and coordination of activities related to the physical facilities.

5.3.1.2. Facility Staffing at Each Innovation Center

Each of the four (4) County Innovation Centers included in the Montgomery County Accelerator Network must have a full-time staff member on-site. Among these staff members and/or others, the Contractor must ensure the efficient management of maintenance and service requests, the allocation and scheduling of coworking areas, public areas, private offices, lab spaces, equipment, meeting rooms, management of breakroom, public Wi-Fi, and other services or supplies as needed. These staff members can share these duties and others, as needed, among facilities.

5.3.1.3. Special Construction Projects and Repairs

As identified throughout the day-to-day operations, special construction projects and repairs will be identified, and cost-effective resolutions with several quotes will be presented to the County for approval and resolution.

5.3.1.4. Shared Equipment

The selected Contractor must be responsible for securing specialized equipment for the innovation centers aligned with tenant demand through sponsorships and donations; and for overseeing the management, scheduling, maintenance, and training of this shared equipment for use by biotech and advanced manufacturing startups in the Montgomery County Accelerator Network centers and other technology innovation entrepreneurs in the County.

5.3.1.5. Facility Improvements

The selected Contractor must develop and execute a cost-effective plan to upgrade each of the four Montgomery innovation centers in a coordinated, branded fashion to make the space more functional for tenants and for others in the technology innovation ecosystem to including, but not limited to, robust a/v services, flexible workspaces, shared wet lab space, prototyping equipment, huddle rooms and collaborative areas. Throughout the contract term, the selected Contractor must continue to recommend facility refresh/upgrades when necessary to the designated Contract Administrator and

oversee implementation of approved proposals.

5.3.2. Portfolio Management

For each of the four Montgomery County innovation centers, all aspects of tenant management will be performed including, but not limited to, prospect identification and recruitment, tenant onboarding, tenant offboarding, relationship management, technical assistance, fundraising assistance, commercialization assistance, resource referrals, community building, tenant metrics tracking, high quality customer service to tenants and to others using the facilities while supporting the County's economic development goals. To achieve this, the following must be performed at a minimum:

5.3.2.1. Recruitment and Onboarding Services

Management of all aspects of the recruitment, application, review, approval, renewal, and onboarding process with guidance from the designated Contract Administrator to ensure in compliance to County priorities, resources and future plans.

5.3.2.2. Day-to-Day Tenant Customer Service

Handling all aspects of tenant customer service including maintaining strong, positive relationships with tenants; handling tenant agreements, security deposit and payment processing for the County; credit card fees, invoicing, assisting with scheduling; and resolving issues or disputes that arise with tenants.

5.3.2.3. Resource Referrals

To support the tenant's success, a diverse network of resource partners and organizations covering a variety of topics must be maintained, and introductions made to tenants upon their request.

5.3.2.4. Off-Boarding and Graduation Services

Prepare tenants for successful graduation from the innovation centers to new facilities, assist with graduation resources, hold an exit interview and incorporate any lessons learned for current/new tenants, invite the graduated tenants to join alumni network and share metrics (jobs and funding) on an ongoing basis, make the designated Contract Administrator and other identified CEX staff aware of the graduation celebration and the graduating tenants' success stories.

5.3.2.5. Data Tracking and Reporting

Perform and manage all aspects of tenant data tracking, including tenant pre- and post-graduation data as outlined by the Contract Administrator to be assigned by the County. The selected Contractor must include as part of the reporting process, revenue and expenditure reports, prospect pipeline, new licenses and graduations, # of employees per company, occupancy rates, tenant success stories (including new funding, customer partnerships and other successes).

5.3.2.6. International Soft Landing

Assist international companies with the onboarding process including providing connections to service providers, R&D resources, regulatory advisors, capital access programs, sales and business development professionals to ensure successful integration and growth for companies residing in innovation centers for market entry and East Coast business expansion. Manage international training programs for prospects and incorporate international prospects where possible into local programing. Manage all aspects of the County's participation in the State of Maryland's Global Gateway Soft Landing Program and report status quarterly to the Contract Manager designated by the County.

5.3.3. Marketing and Promotional Activities

To attract entrepreneurs from within the County, elsewhere in the United States, and overseas, the selected Contractor must market the Montgomery County Accelerator Network and associated programming, utilizing knowledge gained from market research in combination with marketing and promotional tools including, but not limited to, advertising, digital marketing, newsletter and email campaigns, brochures, virtual facility tours, case-studies and interviews highlighting successful projects and tenants. To enhance the Network's local and global profile, the selected Contractor must perform the following.

5.3.3.1.1. Market Research

The selected Contractor must perform regular market research to understand the trends, needs and preference of potential clients and utilize this information to tailor marketing strategies and improve service offerings.

5.3.3.1.2. Brand Building

The selected Contractor must develop a strong brand identity for the Montgomery County Accelerator Network that reflects its mission and values. Consistently communicate with this brand through all marketing materials and interactions to build recognition and trust.

5.3.3.1.3. County Facilities

Highlight the benefits and special features at each Innovation Center and the tenants within them and the technological innovations they are developing.

5.3.3.1.4. Affiliates and Partners

Publicize network partners and affiliated organizations in a mutually beneficial cross-promotional manner.

5.3.3.1.5. Programming Services

Promote programming and services offerings available not only to the County center tenants, but also to other technology innovation entrepreneurs throughout the County.

5.3.3.1.6. Acknowledgement

On all literature, programming support, and promotional activities, the County must be acknowledged as the primary funder and sponsor.

5.3.4. Programming Management

The selected Contractor must provide startups and other technology innovation entrepreneurs in the County, a robust suite of programming activities including, but not limited to accelerator cohort programs, business education and networking events, community building programs, pitch/showcase events, one-one-one mentoring/specialized coaching. While tenants in the four Montgomery County Accelerator Network centers must be prioritized in receiving this programming, other entrepreneurs in the County can participate in these innovation support programs as space allows.

5.3.4.1. Accelerator Cohort Programs

The selected Contractor must provide Accelerator cohort training programs designed to help startups in the innovation centers successfully navigate from idea to commercialization. Where possible, technology innovation entrepreneurs from elsewhere in the County should be invited to participate. The focus of each Accelerator program should be based on the greatest needs of the tenants and the opportunity for impact has been determined (e.g. industry sector, stage of technology readiness).

5.3.4.2. Business Education and Networking Events

5.3.4.2.1. Educational and Networking Programming

The selected Contractor must create and provide educational programs which will provide the technical, commercialization and other business growth information most valued by the Montgomery County Accelerator Network tenants. The programs must include networking opportunities for entrepreneurs to connect with each other and with those skilled in the educational topics highlighted. While these events must be prioritized to the County innovation center tenants' needs, they will be open to other technology innovation entrepreneurs throughout the County.

5.3.4.2.2. Community Building Programing

The selected Contractor must ensure regular programs are provided to foster community building at each center and across the County's broader technology innovation ecosystem.

5.3.4.2.3. Showcase/Pitch Events

The annual programing must include pitch and/or showcases enabling entrepreneurs to demonstrate their products or services and plans for business growth to potential collaborators, promoters, investors and sponsors.

5.3.4.3. Fundraising, Grant and Capital Access Assistance

The selected Contractor must provide tenants with education and connections related to the various types of funding opportunities. This includes, but is not limited to one-on-one coaching, support related to investor pitches, grant preparation and application assistance, and follow-up actions.

5.3.4.4. Individual Business Growth Expertise Support Services

Offer personalized one-on-one support tailored to unique needs of each tenant across diverse advanced technology sectors. Facilitate connections among tenants and expert advisors who possess technical and business commercialization expertise (e.g., grant writing, license creation, customer discovery, regulatory, legal, product development, marketing, fundraising, sales, pricing expertise) to drive the tenants' growth and success.

5.3.5. Partnership Management

Facilitate partnerships with key stakeholders, including universities, industry partners and government agencies on behalf of the County to benefit the innovation centers and their tenants. Collaborate on joint marketing initiatives and leverage these partnerships to enhance Montgomery County Accelerator Network's reputation and reach. Services offered through these collaborations include, but are not limited to mentoring, educational programming, discounted equipment and business promotional services; international soft-landing programs, technology innovation education and other business support.

5.3.6. Subcontracting

If the selected Contractor plans to subcontract any of the Scope of Services listed in this RFP, they must include a description of the services to be provided and associated costs in their proposal, as well as the past performance of the subcontractor for each relevant service to be provided.

5.3.7. 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, Attachment F). To the extent the Contractor has access to the County's network or data, the Contractor must adhere to the County's Information Resources Security Procedure (AP 6-7).

- 5.3.7.1. The County's Information Resources Security Procedures (AP 6-7) references the County's Administrative Procedure 6-1 (AP 6-1). Use of County Provided Technology, AP 6-1 is included collectively in Attachment E and is incorporated by reference herein.

5.4. Contractor's Qualifications

- 5.4.1. The successful Contractor must have a proven experience in delivering services outlined in the Scope of Services.
- 5.4.2. Eligible entities include non-profit innovation organizations, universities and research institutions, public-private partnership organizations and for-profit technology innovation service providers.
- 5.4.3. The successful Contractor must have experience in all the focus areas of the innovation centers and demonstrate the ability to pivot with changes in the economy, County priorities, etc.

5.5. Contractor's Responsibilities

- 5.5.1. The successful Contractor must provide facility and programing management at all four innovation centers within the Montgomery County Accelerator Network.
- 5.5.2. The successful Contractor must perform Portfolio Management actions to grow and enhance the Montgomery County Accelerator Network and the business success of tenants residing in the County's innovation centers.
- 5.5.3. The successful Contractor must create and execute a robust programming plan for the Network and the Montgomery County-wide technology innovation ecosystem that successfully contributes to community building and technology entrepreneur expertise.
- 5.5.4. The Contractor must provide the County with fee structure list for review and advisement prior to enacting and fee schedule changes.
- 5.5.5. The Contractor must manage data and provide timely reports to the County.
- 5.5.6. The Contractor, including any sponsors must not be allowed to stake any claim to any tenant's business, services, inventions, discoveries, or products developed while the tenant is residing in the County's innovation centers.
- 5.5.7. The Contractor will review the pricing models with the County for approval prior to enacting them with clients.
- 5.5.8. The Contractor will advise the Contract Administrator assigned to the Contract on technology innovation opportunities the County may want to consider supporting.

5.6. County's Responsibilities

- 5.6.1. The Contract Administrator assigned by the County to this contract and other County staff will provide feedback and responses to the selected Contractor regarding concerns and questions related to the Scope of Services in a timely manner, as would be reasonable given the nature of the response requested.
- 5.6.2. The Contract Administrator assigned by the County to this Contract and other County staff will provide feedback and guidance on proposed programing, facility improvements and renovation and proposed fee structures related to tenants.
- 5.6.3. The County will be responsible for paying innovation facility leases (MCAI, GIC) and condo fees (RIC).

5.7. Reports/Deliverables

- 5.7.1. The Contractor shall provide monthly reporting to include financial expenditures, revenue, summary of facility management, data regarding portfolio management actions (prospect pipeline, onboarding and graduations, tenant information), planned and executed programing, programing attendance and outcomes, new partnership possibilities, and anticipated challenges or opportunities. The due date for these reports will be established upon execution of the contract.
- 5.7.2. The selected Contractor must provide monthly Revenue Reports by the 20th of the following month to the Contract Administrator assigned to the Contract with a payment for the collected revenue.

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, 2027. The 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 for four (4) times for one (1) year each.

6.2 PRICE ADJUSTMENTS

- 6.2.1** Prices quoted are firm through June 30, 2027, after the execution of the contract (initial term). Years 2-5 will include a standard operating increase of 3% each year. Any additional price adjustments will not be allowed.

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.
- 7.1.2. Vendor interviews will be conducted with the five (5) highest scoring offerors based on the QSC's score for each written proposal. The interview criteria that will then be utilized are listed below under Section D.7.1.9.b. The QSC will also review an offeror for responsibility.