



MONTGOMERY COUNTY PUBLIC SCHOOLS

www.montgomeryschoolsmd.org

MARYLAND

301-279-3555

August 16, 2018



RFP Number: 4499.1
Due Date: September 7, 2018
Open Time: 2:00 p.m.

To: Prospective Offerors:

The purpose of this RFP is to solicit and engage one or more professional and knowledgeable contractor(s) to provide administrative services for a third party employee assistance program at MCPS.

A pre-proposal conference will be held for prospective offerors on Tuesday, August 28, 2018 at 10:00am at 45 W. Gude Dr., Cherry Conference Room, Rockville, MD 20850. Questions regarding the RFP must be submitted by the close of business, 4:00 p.m., on Wednesday, August 22, 2018. Responses will be posted on eMaryland Marketplace and on MCPS' Procurement website on Monday, August 27, 2018.

Please respond according to the instructions provided in the attached. Proposals must be received on or before 2:00 p.m., on Friday, September 7, 2018. Proposals received after this date and time will not be considered. Proposals shall be delivered in a sealed opaque envelope with the RFP number, opening date and opening time indicated in the lower left corner of the envelope. Proposals shall be delivered to Montgomery County Public Schools Procurement Unit, 45 West Gude Drive, Suite 3100, Rockville, Maryland 20850.

The contractor must submit one (1) original, one (1) redacted copy, one (1) electronic version on CD or flash drive and five (5) separate copies of the proposal. The proposal must be signed by an official having authority to contract with MCPS. The firm and official's name shall be used. This solicitation does not commit the district to pay any costs incurred in the submission of proposals or guarantee that an award will be made.

In the event of emergency closing of the MCPS Board of Education offices, this RFP will open at the same time on the next regular working day.

Sincerely,

Kathleen Lazor, Director
Department of Materials Management

KCL:amd
Enclosure

Procurement Unit

45 West Gude Drive, Suite 3100 ♦ Rockville, Maryland 20850-9999

Department of Materials Management
MONTGOMERY COUNTY PUBLIC SCHOOLS
Procurement Unit
45 West Gude Drive, Suite 3100
Rockville, Maryland 20850

Request for Proposal No. 4499.1

Administrative Services for a Third Party Employee Assistance Program

1.0 INTENT

Montgomery County Public Schools (hereinafter known as “MCPS” and/or the “school system”) is issuing this Request for Proposals (hereinafter known as “RFP”) to provide third party administrative services by a qualified service provider (hereinafter known as “Offeror”) for an Employee Assistance Program (hereinafter known as “EAP”). At present, MCPS provides EAP services free of charge to employees, household family members, and retirees through an internal service delivery model which utilizes two (2) full-time professional MCPS staff members. MCPS’ EAP is independent of existing health benefits and, when necessary, acts as a referring agency to an individual regarding access to health benefits covering medical, behavioral, and other related matters. It is the intent of this RFP to solicit sealed proposals from qualified Offerors to establish a contract for EAP services with the Board of Education of Montgomery County (hereinafter known as “Board”) on behalf of MCPS employees and household family members. This external service delivery model would be offered in conjunction with the current internal service delivery model and, in effect, would create a hybrid model. The anticipated duration of services to be provided under this contract is for an initial term of either one (1), two (2) or three (3) years, potentially beginning on October 1, 2018, with prices remaining firm during the initial term of the contract. The Board is the legal entity and governing authority which will award any resulting contract. A final contract award is dependent upon final the Board’s approval and the availability of funds.

2.0 BACKGROUND

MCPS is the fourteenth (14th) largest school system in the United States, and the largest in the State of Maryland. During the 2017–2018 school year, it is projected that MCPS will serve more than one hundred sixty thousand (160,000) students from one hundred fifty-seven (157) countries speaking one hundred fifty (150) languages. Among the two hundred five (205) schools that MCPS operates, thirty-nine (39) are National Blue Ribbon schools, six (6) MCPS high schools rank in the top two hundred (200) of *The Washington Post*’s 2015 High School Challenge, and all twenty-five (25) MCPS high schools appear on this list, which only includes the top eleven percent (11%) of high schools in the country.

MCPS has one of the highest graduation rates among the nation’s largest school districts, according to an *Education Week* report. In 2010, MCPS was the recipient of the Malcolm

Baldrige National Quality Award, the highest presidential honor given to American organizations for performance excellence.

2.1 Student demographics of MCPS in 2017 are as follows:

- White: 28.3%
- Hispanic/Latino: 32.3%
- Black or African American: 21.4%
- Asian: 14.4%
- Two or more races: ≤ 5.0%
- American Indian or Alaskan Native: ≤5.0%
- Native Hawaiian or other Pacific Islander: ≤5.0%
- Students receiving free & reduced-price meals (FARMS): 35.1%
- Students ever receiving FARMS: 43.3%
- English for speakers of other languages (ESOL): 17.5%
- Students receiving special education services: 11.7%

With an approved Fiscal Year (FY) 2019 Operating Budget of approximately \$2.60 billion, MCPS employs more than twenty-three thousand (23,000) employees with the majority represented by three (3) collective bargaining units.

In 1983, the Board established an internal employee counseling program in order to provide a comprehensive employee evaluation and referral service. At that time, the goals of the program were to assist the school system with the acknowledged costs of an employee through evaluation and referral services, as well as to provide quality assessment, diagnostic interviews, and referral services for employees and their families to address their personal concerns. Accessibility and confidentiality were key components of the service, and these components remain critical to MCPS' EAP success today. There are approximately 700 individual clients served in a given year.

Administrative discussions with the Board in January and February 2018 resulted in an approval to create a hybrid service delivery model with the intention of providing a choice relative to short-term treatment for self or supervisor-referred staff. Both the internal and external EAP models have notable strengths. Primarily, the internal EAP model provides a connection to the organization and knowledge of organizational culture. The external model will provide a capacity to offer more counseling options and a broader range of services. Through examination of EAP literature and benchmarking, combining the internal and external model into a hybrid will provide our employees with multiple options and an array of services. Additionally, services such as legal, financial, and consultation on elder care/child care etc. would also be offered through the external service delivery model.

3.0 SCOPE OF SERVICES

MCPS seeks proposals which will address the following external EAP service delivery priorities:

- Twenty-four (24) hours per day, seven (7) days per week, three hundred sixty-five (365) days per year crisis hotline that is staffed with mental health professionals for assessment and referral services.
- Counseling services by qualified mental health Offerors for up to six (6) face-to-face sessions for employees and eligible family members. Such services would include, but not necessarily be limited to, identification, assessment, short-term treatment services, referrals (MCPS staff or self-referral), and follow-up services.
- Same day emergency appointments for employees, administrators, and/or supervisors making viable requests.
- Immediate assistance in the form of consultation with MCPS administrators and/or supervisors.
- On-going assistance in the form of consultation with MCPS administrators and supervisors.
- Provide comprehensive counseling services to include, but not necessarily be limited to, emotional and personal conflicts, stress or life crises, couples and family concerns, and grief and loss.
- Identify reporting capabilities to share data analytics, including, but not necessarily limited to, utilization rates, types of issues being addressed, employee service satisfaction with EAP services, and administrator/supervisor satisfaction with EAP services.
- Fifty (50) hours of on-site training and seminars for employees and administrators/supervisors.
- Fifty (50) hours of Crisis Response Services (i.g., mental health counseling services to respond in the event of a school crisis).

While MCPS encourages Offerors to envision creative approaches to offering EAP services, proposals must provide explicit information in order to be considered; MCPS reserves the right to reject incomplete proposals. A potential Offeror should prepare a response to the RFP which includes, at a minimum, the following information:

3.1 Qualifications

- 3.1.1 Offeror's names, address, phone number, and contact person.
- 3.1.2 Organizational chart that identifies the complete structure of the Offeror, including any parent company, headquarters, regional offices, and subsidiaries of the Offeror.
- 3.1.3 Organizational chart outlining key personnel, including, but not limited to, the names and job titles of headquarters or regional management personnel who may be involved with supervising the services to be performed under this contract. Job titles other than those commonly used by industry standards must include a crosswalk reference document.

- 3.1.4 Statement of the Offeror's experience in the provision of EAP services, including, but not necessarily limited to, the number of years the Offeror has administered EAP benefits.
- 3.1.5 Statement of the Offeror's experience with Maryland-based clients, including, but not necessarily limited to, the number of years the Offeror has administered services to Maryland-based clients.
- 3.1.6 Statement of compliance with EAP Federal Regulation, 14 CFR 120.115
- 3.1.7 Statement of the Offeror's experience with education-based clients, including, but not necessarily limited to, the number of years the Offeror has administered services to education-based clients.
- 3.1.8 Description of the history of the organization, its growth on a national level, and its ownership structure.
- 3.1.9 Statement of the total number of individuals covered for 2017 and 2018 under:
 - 3.1.9.1 All EAP plans administered or insured.
 - 3.1.9.2 All EAP plans administered or insured in the State of Maryland.
 - 3.1.9.3 All EAP plans administered or insured for education-based clients.
- 3.1.10 Copies of license(s) to conduct business in the State of Maryland.
- 3.1.11 List of professional staff/Offerors who would be providing EAP services to MCPS employees. Such information should include, but not be limited to, the resumes, licensing and/or certification qualifications for identified Offerors.
- 3.1.12 List of agencies or organizations with whom the Offeror has worked and the nature of the relationship.
- 3.1.13 List of professional memberships and/or affiliations.

3.2 Service Description

- 3.2.1 Statement of the philosophy and objectives of the agency.
- 3.2.2 Definition of a case.
- 3.2.3 Copy of policies, handbooks, ethical standards, or other appropriate service materials utilized by agency offering the EAP.

- 3.2.4 Description of all available options for service delivery (e.g., telephonic, on-line chat, face-to-face, etc.). Such information should include a description the Offeror's capacity to service clients with disabilities and/or who speak languages other than English.
- 3.2.5 Description of measures taken to ensure compliance of the Health Insurance Portability and Accountability Act (HIPPA).
- 3.2.6 Description of short-term treatment goals, including, but not necessarily limited to, the number of sessions available and the differentiation of treatment based on self or supervisor referrals.
- 3.2.7 Identification of the types of consultations, training, and/or assistance available to persons in supervisory roles when addressing job performance issues.
- 3.2.8 Plan for the development and maintenance of relations with Offerors of health benefits for employees, including, but not necessarily limited to, a description of methods to facilitate the linking of EAP services with an employee's health care benefits.
- 3.2.9 Description of how the utilization rates and customer satisfaction data would be presented to the Superintendent or designee of the system.
- 3.2.10 Description of how utilization is calculated.
- 3.2.11 Description of how EAP, work/life services, behavioral health, and medical can be integrated.
- 3.2.12 Description of available legal/financial/pet care services.
- 3.2.13 Description of available child/elder care consultation services.
- 3.2.14 Description of available work/life services.
- 3.2.15 Identification of available supervisory training activities/webinars.
- 3.2.16 Description or schedule of webinar activities aimed at supporting employee engagement.
- 3.2.17 Samples, as applicable, of the following:
 - 3.2.17.1 Offeror paperwork, client satisfaction survey, workshop evaluations.

- 3.2.17.2 Supervisor DOT Drug and Alcohol Program training, including, but not necessarily limited to, the availability to provide training as requested for a maximum of four (4) times per year.
- 3.2.17.3 Supervisor and employee orientation videos.
- 3.2.18 Description of the process used to resolve client service complaints, including, but not necessarily limited to, the process for informing MCPS.
- 3.2.19 Description of the case management system used, including, but not necessarily limited to, retention and purging of records.
- 3.2.20 Description of how the Offeror would share information (i.e., data analytics, case review, follow-up actions, etc.) with MCPS' internal service providers.
- 3.2.21 Explanation of how cancelled appointments or client "no shows" are counted and remunerated (i.e., are affiliates compensated for "no shows" and cancelled appointments?).
- 3.2.22 Description of crisis response services, including, but not necessarily limited to, the response time from request for services.
- 3.2.23 Explanation of telephonic or on-line counseling wait times, including, but not necessarily limited to, anticipated response time from a message.
- 3.2.24 Percentage of calls resulting from face-to-face sessions, including, but not necessarily limited to, how this data will be reported.
- 3.2.25 Description of how non-urgent appointments are guaranteed, including, but not necessarily limited to, the minimum wait period.
- 3.2.26 Description of urgent appointments within a twenty-four (24)-hour period, including, but not necessarily limited to, percentages.
- 3.2.27 Description of follow-up provided following emergency and after-hour calls, including, but not necessarily limited to, how this data will be reported.
- 3.2.28 List and description of any additional or optional services offered without charge that have not been requested.

3.3 Innovation

- 3.3.1 Description of program and proposed design to help achieve service delivery innovation. Indicate how the Offeror would demonstrate ownership and support MCPS with these recommendations, as well as identify results that will be measurable, reportable, and, potentially, guaranteed.

- 3.3.2 Examples of innovative models the Offeror has developed or implemented to address a holistic approach to behavioral health care with linkages across the health care spectrum.
- 3.3.3 Description of any formats implemented by Offeror to deliver EAP services in a unique way (e.g., telephonic individual or group counseling, on-line counseling).
- 3.3.4 Description of an available secure user portal or any other type of log-in restricted website as part of the Offeror's service delivery model.

3.4 Offeror Network

- 3.4.1 List of Offeror's network of professional providers in Montgomery County and those available within a fifty (50)-mile radius.
- 3.4.2 Explanation of criteria used for selecting independent professional providers for Offeror's network.
- 3.4.3 List of minimum requirements for each type of professional provider which allow consideration for the network.
- 3.4.4 Explanation of nominating process which would allow professional providers to be a part of the Offeror's network.
- 3.4.5 Demonstration of malpractice insurance, including, but not necessarily limited to, coverage limits of the Offeror and the professional provider(s) within the Offerors network.
- 3.4.6 Percentage of providers in the Offeror's EAP network which are also parts of the Offeror's behavioral health network.

3.5 Communications

- 3.5.1 Plan, including, but not necessarily limited to, sample materials, of how Offeror will assist MCPS with communicating the EAP services to employees.
- 3.5.2 Explanation of website capabilities, including, but not necessarily limited to, customization using MCPS' logo.

3.6 Business Plan

- 3.6.1 Plan of operation including, but not necessarily limited to, coordination between the Offeror and MCPS.

3.6.2 Sample implementation plan and associated budget(s), including, but not limited to, coordination between the Offeror and MCPS.

3.6.3 Statement of proposed insurance coverage.

3.7 Financial Capability

3.7.1 Copy of recent audit or certified financial statements, preferably a profit and loss statement and a balance sheet, for the past two (2) years.

3.7.1.1 List of funds, if applicable, available to the agency:

3.7.1.2 In banks. Include bank name, address, phone number and amount.

3.7.1.3 By loans. Include service, address, phone number, and amount.

3.7.1.4 By sale of assets. Include description, market value, and amount of mortgages or liens.

3.7.2 Other. Please describe.

3.7.3 List of bank references.

3.7.4 List of date, place, and name if Offeror or any affiliate has declared bankruptcy with the past ten (10) years.

3.7.5 Response to the following: *“Does any member of MCPS or any officer or employee who exercised any functions or responsibilities in connection with the RFP have any direct or indirect personal interest in the Offeror?”*

NOTE: Offeror may attach any additional material as evidence of financial capability. Any material submitted which is considered confidential must be so noted.

3.8 Cost/Fee Structure

3.8.1 Start-up budget and operating budget for one (1) full year and an estimate of years 2 and 3.

3.8.2 Nature and schedule of charges to MCPS, or the provision of an EAP consistent with the Scope of Services.

3.8.3 Description of performance metrics, including, but not necessarily limited to, the frequency to be used to guarantee contractual services.

It is the intention to award to the most favorable Offeror(s) based on the evaluation criteria in Section 11.0. However, the Board reserves the right to make awards according to the best interest of MCPS. This RFP may result in multiple awards for different components of the scope of services.

In determining the qualifications of an Offeror, MCPS will consider the Offeror's record and performance of any prior contracts with MCPS, federal departments or agencies, or other public bodies, including but not limited to the Offeror's record providing EAP services to other schools or school districts.

MCPS may conduct any necessary investigation to determine the ability of the Offeror to perform the work, and the Offeror shall furnish to MCPS all such information and data requested, such as information about its reputation, past performance, business and financial capability and other factors that demonstrate that the Offeror is capable of satisfying MCPS' needs and requirements for a specific contract. MCPS expressly reserves the right to reject any proposal of any Offeror if the evidence submitted by the Offeror or investigation of such Offeror discloses that the Offeror, in the opinion of MCPS, fails to satisfy MCPS that such Offeror is properly qualified to carry out the obligations of the contract or has not properly performed such prior contracts or has habitually and without cause, neglected the payment of bills or has otherwise disregarded its obligations to sub-contractors or employees. Consideration will be given to any previous performance with MCPS as to the quality and the acceptability of the Offeror's services.

All Offerors submitting a proposal shall include evidence that they maintain a permanent place of business. Copies of any appropriate licenses necessary to perform this work shall be submitted with each proposal. Offerors also shall demonstrate that they have adequate staff to perform the required services. Use of subcontractor(s) and/or third party providers, if any, must be specifically identified within the proposal. Subcontractor and/or third party provider roles shall be clearly expressed. MCPS reserves the right to accept or reject use of proposed subcontractor(s) and/or third party provider(s).

MCPS reserves the right to add or delete Offeror's, as needed, should our requirements change during the contract term.

4.0 CONTRACT TERM

The initial term of contract shall be one (1) two (2) or three (3) years. However, the contract may not begin until one day after approval by the Board and will conclude as stated under the contract term. MCPS reserves the right to extend this contract at existing prices, terms and conditions for one additional term for one (1) or two (2) years at its sole discretion. Written notice indicating MCPS' intention to pursue the extension of the contract will be issued to the successful vendor 90 days prior to the expiration of the original contract. The vendor shall have ten (10) days from the date of notification to return the notice acknowledging its intent to accept or reject the extension.

MCPS staff may make a recommendation to the Board to extend the contract or decide to rebid. If the contract is extended by the Board, a contract amendment will be issued.

5.0 CONTRACT TERMINATION

MCPS reserves the right to cancel the contract in whole or in part at any time in accordance with Article 12 of the MCPS General Contract Articles as set forth in Appendix A of this RFP. MCPS also reserves the right to cancel the contract with a specific Offeror for failure to comply or failure to fulfill the terms of this contract in accordance with Article 13 of the MCPS General Contract Articles.

6.0 REFERENCES

All Offerors shall include a list of a minimum of five references who use the Offerors services and who can attest to the Offerors quality of work and, if possible, shall include school districts of comparable size to MCPS that have utilized the Offerors' services. Include names of client, contact person, email address and phone number of all references. Also, as an attachment, Offerors shall include a list of all current school district clients.

References may or may not be reviewed or contacted at the discretion of MCPS. Typically, only references of the top ranked short listed Offerors are contacted. MCPS reserves the right to contact references other than, and/or in addition to, those furnished by an Offeror.

<u>Company Name & Address</u>	<u>Contact Person</u>	<u>Phone Number</u>
1. _____		
Email _____		
2. _____		
Email _____		
3. _____		
Email _____		
4. _____		
Email _____		
5. _____		
Email _____		

7.0 FORMAT OF RESPONSE

7.1 Response to this RFP shall be submitted in the same order as the RFP and provide an individual response to each RFP specification.

7.2 Offerors shall include any and all statements and representations made within its proposal in the contract for services with the MCPS. This includes, but is not limited to, the vendors' point-by-point response to this RFP. If the vendor responds only "Understand and comply," it is assumed that the vendor complies with MCPS' understanding of the requirement.

7.3 MCPS shall not be responsible nor be liable for any costs incurred by the vendor in the preparation and submission of their proposals and pricing.

7.4 Pricing proposal, to be completed on Attachment F, shall be submitted as a separate document.

8.0 MANDATORY SUBMISSIONS

Each Offeror must submit a complete proposal including all required information and attachments. The response shall address each paragraph in the same order as the RFP and provide an individual response to each RFP specification. All proposals must be presented using the same numbering sequence and order used in this RFP document or as otherwise specified by MCPS. Offerors may request via e-mail to Angela McIntosh Davis, Team Leader, MCPS Procurement Unit at Angela_S_McIntosh-Davis@mcpsmd.org, a Microsoft Word version to help them in preparing the response. One (1) original response and Five (5) copies, one (1) electronic version of the response on CD or flash drive, one (1) redacted copy, and one (1) electronic version on CD or flash drive of the redacted response must be sent by mail, courier, or hand-delivery and shall be in binders with tabs identifying each section. A table of contents should be included and all pages numbered as referenced in the table of contents. No faxes or electronic submission of proposals will be accepted. Proposals must be received no later than 2:00 p.m. on Friday, September 7, 2018. Submit responses of the entire RFP proposal to:

Montgomery County Public Schools
Procurement Unit
45 West Gude Drive, Suite 3100
Rockville, MD 20850

Submissions will become the property of MCPS.

The proposal must be signed by an official having authority to contract with MCPS. The firm and the official's name shall be used in the contract process. MCPS reserves the right to make an award without further discussion of the proposals received. MCPS may also negotiate with the one Offeror who submits the best proposal or with two or more Offerors who are in the competitive range. Therefore, it is important that the Offeror's proposal be submitted initially on the most favorable terms from both the technical and cost standpoints. After the submission and closure of proposals,

no information will be released until after the award. It is understood that the Offeror's proposal will become a part of the official file on this matter without obligation to MCPS.

The proposal must be complete and comply with all aspects of these specifications. Marketing or promotional verbiage will likely overshadow the Offeror's qualifications and expertise. MCPS urges the Offeror to be specific and brief in their responses.

Offerors must include any and all statements and representations made within its proposal in the contract for services with MCPS unless otherwise agreed upon by MCPS and Offeror during negotiations. This includes, but is not limited to, the vendor's point-by-point response to this RFP. If Offeror answers only "Understand and comply" it is assumed that the Offeror complies with MCPS' understanding of the requirement.

MCPS shall not be responsible or liable for any costs incurred by the Offeror in the preparation and submission of their proposals and pricing.

Complete Response must include:

- Point-by-point Response to each section of the RFP
- Examples of similar work completed in other school districts or comparable institutions as noted above in Section 3.0 Scope of Services.
- Detailed plan (no more than 7 pages total) as detailed in scope of services (qualifications, service description, innovation, Offeror network, business plan, financial plan, and cost/fee structure), see 3.0 Scope of Services.
- Pricing Proposal, see Attachment F
- References, See 6.0 References
- List of all current school district clients, See 6.0 References
- Vendor's annual fiscal report in order to demonstrate the vendor's financial stability (If desired, the vendor may also include any other financial documents that Vendor wishes to include regarding Vendor's financial condition. This documentation is not mandatory.)
- Equal Opportunities Certification (Attachment A)
- Certification of Non-segregated Facilities (Attachment B)
- Minority Business Enterprise (Attachment C)
- Non-Debarment Acknowledgement (Attachment D)
- Mid-Atlantic Purchasing Team Rider Clause (Attachment E)
- Current Form W-9
- A list of any variances from or objections to the terms and conditions of the MCPS General Contracting Articles, as well as a justification for any such variances or objections.
- Any additional information and comments your firm deems necessary to clearly communicate your firm's qualifications and the process you would use to provide EAP services as specified in the Scope of Services.
- A redacted copy of Offeror's proposal as specified in Sections 9.0 and 10.0.

9.0 TREATMENT OF TECHNICAL DATA IN PROPOSAL

The proposal submitted in response to this request may contain technical data which the Offeror does not want used or disclosed for any purpose other than evaluation of the proposal. The use and disclosure of any such technical data, subject to the provisions of the Maryland Public Information Act, may be so restricted:

Provided, that Offeror marks the cover sheet of the proposal with the following legend, specifying the pages of the proposal which are to be restricted in accordance with the conditions of the legend: “Technical data contained in pages __ of this proposal shall not be used or disclosed, except for evaluation purposes.”

Provided, that if a contract is awarded to this Offeror as a result of or in connection with the submission of this proposal, MCPS shall have the right to use or disclose these technical data to the extent provided in the contract.

This restriction does not limit the right of MCPS to use or disclose technical data obtained from another source without restriction.

MCPS assumes no liability for disclosure or use of unmarked technical data or products and may use or disclose the data for any purpose and may consider that the proposal was not submitted in confidence and therefore is releasable. Price and cost data concerning salaries, overhead, and general and administrative expenses are considered proprietary information and will not be disclosed, if marked in accordance with the instructions in 10.0.

10.0 PROPRIETARY AND CONFIDENTIAL INFORMATION

Offerors are notified that MCPS has unlimited data rights regarding proposals submitted in response to this solicitation. Unlimited data rights means that MCPS has the right to use, disclose, reproduce, prepare derivative works, distribute copies to the public, or perform publicly and display publicly any information submitted by the Offeror in response to this or any solicitation issued by MCPS. However, MCPS will exempt information that is confidential commercial or financial information of an Offeror, as defined by the Maryland Public Information Act, State Government Article, Section 10-617, from disclosure. It is the responsibility of the Offeror to clearly identify each part of its proposal that is confidential commercial or financial information by stamping the **bottom right-hand corner** of each pertinent page with one-inch bold face letters stating the words “**confidential**” or “**proprietary**.” The Offeror agrees that any portion of the proposal that is not stamped as proprietary or confidential is not proprietary or confidential. As a condition for MCPS keeping the information confidential, the Offeror must agree to defend and hold MCPS harmless if any information is inadvertently released. Each Offeror must submit a proprietary and confidential redacted copy of its proposal to be used in responding to Maryland Public Information Act requests.

11.0 EVALUATION CRITERIA

MCPS reserves the right to ask clarifying questions about submitted proposals. Offerors also may ask questions that they may have related to this RFP prior to submitting their responses. See Section

12.0, Schedule of Events. Only proposals received by the deadline will be considered. Proposals will be screened down to a number of finalists.

MCPS reserves the right to convene a meeting with the top qualified Offerors prior to awarding a contract. The purpose of the meeting will be to afford both parties an opportunity to discuss any aspects of the requirements and services that will be performed and clarify any issues. Issues raised during the meeting, which cannot be resolved to the satisfaction of MCPS, shall be cause to reject the proposal.

All Offerors are advised that in the event of receipt of an adequate number of proposals, which, in the opinion of MCPS require no clarification and/or supplementary information, such proposals may be evaluated without further discussions. Therefore, proposals should be submitted initially on the most complete and favorable terms and conditions. Should proposals submitted require additional clarification and/or supplementary information, Offerors should be prepared to submit such additional clarification and/or supplementary information, in a timely manner, when requested.

Proposals meeting all requisite criteria will be evaluated. Those who do not meet requisite criteria will not be evaluated further.

The determination of those that are qualified, interested, and available, and MCPS' choice of the best qualified will be based on the following criteria:

- a. The proposed approach to the delivery priorities as outlined in Section 3.0 and how it meets MCPS' needs.
- b. Qualifications, reputation, and experience of the Offeror(s) relevant to the Scope of Services including specific experience in providing reviews of comparable programs for school districts of similar size, including the Offeror's knowledge of best practices.
- c. Qualifications, reputation, and experience of the lead reviewer and principal employees that will be responsible for this review.
- d. Past performance as determined by recent and relevant contracts. Evaluation will be based on information obtained from references provided by the Offeror as well as other relevant past performance information obtained from other sources known to MCPS.
- e. Pricing proposal and fee structure.

A selection committee comprised of MCPS staff and potentially outside stakeholders will evaluate proposals based on these criteria.

12.0 SCHEDULE OF EVENTS

The anticipated schedule of activities related to this RFP is as follows:

RFP issued: August 16, 2018

Questions Due: August 22, 2018 by 4:00pm

Answers Posted: August 27, 2018

Pre-proposal Conference: August 28, 2018 at 10:00AM

Proposals Due: September 7, 2018 by 2:00pm

Anticipated award date: October 2018

All dates are subject to change at the discretion of MCPS.

13.0 PRE-PROPOSAL CONFERENCE

A Pre-Proposal Conference for prospective Offerors will be held on August 28, 2018, at 10:00 a.m., at 45 W. Gude Drive, Cherry Conference Room, Rockville, Maryland 20850. Attendance at this conference is encouraged, but is not mandatory. Questions to this RFP are due by 4:00 p.m. on August 22, 2018 so that responses can be prepared for distribution at the pre-proposal conference. The purpose of the pre-proposal conference will be to allow prospective firms the opportunity to obtain clarification of the RFP and ask questions directly of MCPS staff to assist them in the preparation of their proposal responses.

Firms may request the call-in number information to participate in the pre-proposal conference. Firms shall provide the names of the persons who will attend the pre-proposal conference. Please send no more than two representatives. Send the names to Angela McIntosh-Davis, MCPS Procurement Unit Team Leader, fax number 301-279-3173, or e-mail [Angela S McIntosh-Davis@mcpsmd.org](mailto:Angela_S_McIntosh-Davis@mcpsmd.org) no later than.

14.0 ADDENDA/ERRATA

Changes and addenda to a solicitation may occur prior to the solicitation opening date and time. It is the Offeror's responsibility to check the MCPS website under "Event Calendar" <http://www.montgomeryschoolsmd.org/calendar/mcpsbids.aspx> or contact the Procurement Unit at 301-279-3555 to verify whether addenda/errata have been issued.

In the event that MCPS issues addenda/errata, all terms and conditions will remain in effect unless they are specifically and explicitly changed by the addenda/errata. Offerors must acknowledge receipt of such addenda/errata by returning one signed copy of each of the addenda/errata with its proposal. Failure to provide the signed acknowledgement of the addenda/errata may result in a bid being deemed non-responsive.

15.0 eMARYLAND MARKETPLACE

As of June 1, 2008, Maryland law requires local and state agencies to post solicitations on eMaryland Marketplace. Registration with eMaryland Marketplace is free.

It is recommended that any interested supplier register at www.eMarylandMarketplace.com, regardless of the award outcome for this procurement as it is a valuable resource for upcoming bid notifications for municipalities throughout Maryland.

16.0 MULTI-AGENCY PARTICIPATION

MCPS reserves the right to extend the terms and conditions of this solicitation to any and all other agencies within the State of Maryland as well as any other federal, state, municipal, county, or local governmental agency under the jurisdiction of the United States and its territories. This shall include but not be limited to private schools, parochial schools, non-public schools such as charter schools, special districts, intermediate units, non-profit agencies providing services on behalf of government, and/or state, community and/or private colleges/universities that require these goods, commodities and/or services. Use of this solicitation by other agencies may be dependent on special local/state requirements attached to and made a part of the solicitation at the time of contracting. The supplier/contractor agrees to notify the issuing agency of those entities that wish to use any contract resulting from this bid and will also provide usage information, which may be requested. A copy of the contract pricing and the bid requirements incorporated in this contract will be supplied to requesting agencies. Each participating jurisdiction or agency shall enter into its own contract with the Award Offeror(s) and this contract shall be binding only upon the **principal's signing** such an agreement. Invoices shall be submitted "directly" to the ordering jurisdiction for each unit purchased. Disputes over the execution of any contract shall be the responsibility of the participating jurisdiction or agency that entered into that contract. Disputes must be resolved solely between the participating agency and the Award Offeror. MCPS assumes no authority, liability, or obligation on behalf of any other public or non-public entity that may use any contract resulting from this bid. MCPS pricing is based on the specifications provided in this solicitation.

17.0 INQUIRIES

Inquiries regarding this solicitation must be submitted in writing to Angela McIntosh-Davis, MCPS Procurement Unit Team Leader, 45 W. Gude Drive, Suite 3100, Rockville, MD 20850, via fax at 301-279-3173 or email to Angela_S_McIntosh-Davis@mcpsmd.org. Questions are due 4:00 p.m. on August 22, 2018. Responses will be posted on eMaryland Marketplace and on MCPS' Procurement website on August 27, 2018. The Board will not be responsible for any oral or telephone explanation or interpretation by any agent or employee of MCPS. Any binding information given to an Offeror in response to a request will be furnished to all Offerors as addenda/errata, if such information is deemed necessary for the preparation of proposals, or if the lack of such information would be detrimental to the uninformed Offerors. Only such addenda/errata, when issued by MCPS, will be considered binding on MCPS.

Contact by Offerors with any other MCPS employee regarding this solicitation until the contract is awarded by MCPS will be considered by MCPS as an attempt to obtain an unfair advantage and result in non-consideration of its RFP response. The MCPS Procurement website address is www.montgomeryschoolsmd.org/departments/procurement/.

18.0 UNNECESSARILY ELABORATE BROCHURES

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the Offeror's lack of cost consciousness. Elaborate art work and expensive visual and other presentation aids are neither necessary nor wanted.

19.0 PROTESTS

Any protests, including appeals, will be governed by the applicable MCPS Procurement Unit Regulations.

The burden of production of all relevant evidence, data and documents and the burden of persuasion to support the protest is on the Offeror making the protest.

20.0 CONTRACT

MCPS plans to enter a contractual agreement with the Offeror(s) to whom the award is made and intends to make the MCPS General Contract Articles, included herein as Appendix A, a part of the contract, except and unless modified by MCPS. Proposals must clearly identify any variances from or objections to the specifications in this RFP and the terms and conditions of the MCPS General Contract Articles. Lacking any response to the contrary, MCPS will infer that the Offeror agrees to the specifications of this RFP and each term and condition of the MCPS General Contract Articles. Offerors should note that any variance may provide a basis for MCPS to reject the proposal. **In particular, the provisions set forth in Articles 5, 12-14, 16 -18, 21-24, 26, 28, and 29 of the MCPS General Contract Articles are non-negotiable.**

21.0 NOTICE TO OFFERORS

The appropriate items below must be completed as part of the RFP. Failure to comply may disqualify your bid. Type or print legibly in ink.

I. OFFEROR INFORMATION: As appropriate, check and/or complete one of the items below.

1. Legal name (as shown on your income tax return) _____
2. Business Name (if different from above) _____
3. Tax Identification Number _____

A copy of your W-9 must be submitted with this proposal response.

II. OFFEROR'S CONTACT INFORMATION: This will be filed as your permanent contact information.

1. Company Name _____
2. Address _____

- 3. Representative's Name _____
- 4. Phone Number/Extension _____
- 5. Fax Number _____
- 6. Toll Free Number _____
- 7. Email Address _____
- 8. Website _____

III. VENDOR'S CERTIFICATION: Upon notification of award, this document in its entirety is the awarded vendor's contract with MCPS. By signing below, the undersigned acknowledges that he/she is entering into a contract with MCPS.

- A. The undersigned proposes to furnish and deliver supplies, equipment, or services, in accordance with specifications and stipulations contained herein, and at the prices quoted. This certifies that this bid is made without any previous understanding, agreement or connection with any person, firm, or corporation making a bid for the same supplies, materials, or equipment, and is in all respects fair and without collusion or fraud.
- B. I hereby certify that I am authorized to sign for the Offeror and that all statements, representations, and information provided in this response to the RFP, including but not limited to the Non-Debarment Acknowledgement, are accurate.

By (Signature) _____

Name and Title _____

Witness Name and Title _____