



MONTGOMERY COUNTY COUNCIL ROCKVILLE, MARYLAND

August 27, 2026

The Montgomery County Council is interested in retaining the services of a qualified independent consultant to provide support to a Councilmember office. The role will assist the Councilmember and office staff by providing administrative support services. The work will include maintaining the Councilmember's calendar, scheduling meetings and events, handling calls and correspondence from residents, resident's groups, County government officials, and business organizations, assure quality, completeness, and timeliness of correspondence and reports, utilize and maintain databases, order office supplies, attend meetings and public events with the Councilmember or senior staff to provide administrative support. This solicitation is reserved only for self-certified local small businesses registered timely with the County's Local Small Business Reserve Program (LSBRP). If the Council does not receive any qualified local applications, the Council will open the solicitation process to non-local consultants.

If you are interested in providing this service, please send your proposal, including your plan to accomplish tasks outlined in the scope of work and the rate you would charge per hour. Payments are made upon submission of an approved invoice for projects completed within a specific number of hours and satisfactorily performed as determined by the Council.

If this solicitation is of interest to you, please respond to Stephen Mathany by 5:00 p.m. on September 4, 2026 with your proposal. Responses can be sent by e-mail to stephen.mathany@montgomerycountymd.gov.

It is the intent of the Council to award this contract to the offeror with the greatest experience who is both responsible and responsive to this solicitation. If you have any questions, please contact Stephen Mathany at (240) 777-7905 or by e-mail at stephen.mathany@montgomerycountymd.gov.

A handwritten signature in blue ink, reading "Craig Howard", is positioned above the printed name of the Executive Director.

Craig Howard, Executive Director
Montgomery County Council

Attachments:

Scope of Work

General Conditions

Fee Schedule

Mandatory Insurance Requirements

Montgomery County Government



**Request for Local Small Business Reserve Program (LSBRP) Mini Informal
Solicitation #1201131**

For

STAFF ASSISTANT SERVICES
Office of the County Council

NOTICE OF INFORMAL SOLICITATION

Staff Assistant Services - 1201131

SOLICITATION SUMMARY	Montgomery County, Maryland is soliciting proposals for the provision of staff assistance services for a Councilmember at the County Council as outlined in this Mini Informal Solicitation. Click or tap here to enter text.	
ISSUE DATE	8/28/2026	
PROPOSAL DUE DATE	Proposals are due on 9/4/2026 no later than 5:00 PM ET	
WAGE LAW APPLICABILITY	☒ Yes	☐ No
PREVAILING WAGE LAW APPLICABILITY	☐ Yes	☒ No
PRE-SUBMISSION CONFERENCE	A pre-submission conference will not be held.	
QUESTIONS CONTACT	Technical Questions Contact Stephen Mathany from the Office of the County Council at 240-777-7905 or via email at Stephen.Mathany@montgomerycountymd.gov .	
QUESTIONS DUE DATE	9/2/2026	
PROPOSAL SUBMISSION	Submit proposals electronically to Stephen.Mathany@montgomerycountymd.gov Proposals received after the due date and time will not be considered.	

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LOCAL SMALL BUSINESS RESERVE PROGRAM (LSBRP) NOTICE

Staff Assistant Services - 1201131

This solicitation is reserved for only **application submitted/certified** local small businesses timely registered with the County's LSBRP. This solicitation thus comes under County Code, sections 11B-17A; 11B-65; 11B-66A; 11B-70 and Executive Regulation 21-05AM. These documents can be accessed through the [LSBRP web site](#).

LSBRP criteria are based on a firm's location, ownership status, number of employees and annual revenue amount. Submitting a bid/proposal constitutes willfully stating your firm has an **application submitted** or is already a currently **certified** Local Small Business. Therefore, if you wish to submit a proposal for this solicitation adhering to the LSBRP, you must:

- Submit an application as a LSBRP firm prior to the proposal's due date. If your LSBRP status is not **application submitted/certified** in our database prior to the proposal's due date and time, then your proposal will be deemed unacceptable and removed from consideration. Go to the [LSBRP web site](#) and follow the instructions under "Registration/Certification."
- After the solicitation closes and upon notification by the County, you must provide within three (3) business days the LSBRP documentation of:
 - All business location(s) (if more than one),
 - Number of employees by location,
 - Annual gross revenue of the business for the past three fiscal years.

Preferred documents: a copy of a lease, Maryland Unemployment Insurance Contribution Report (summary or quarterly), and Financial Statement/Tax Returns. At the discretion of the LSBRP, alternative types of documents might be accepted.

If, after receipt of these documents, the LSBRP finds that your firm does not meet the LSBRP requirements, then your proposal will be deemed unacceptable and removed from further consideration. For questions, contact the LSBRP Program Manager at 240-777-9913 or send an email at lsbrp@montgomerycountymd.gov.

SPECIAL NOTIFICATION FOR ISSUANCE UNDER LSBRP

This Informal Small Purchase Solicitation is being advertised under the Local Small Business Reserve Program (LSBRP). Should it be determined there are no responsive, responsible Local Small Businesses that respond to this solicitation, or that it is otherwise in the best interests of the County, Montgomery County may exercise an option to extend the solicitation advertisement for a minimum of five (5) days as non-LSBRP.

Any advertisement extension will be in the form of a solicitation amendment with the reissuance of the solicitation.

If you have any questions, please contact [Stephen Mathany](#) from the [Office of the County Council](#) at [240-777-7905](tel:240-777-7905) or via email at Stephen.Mathany@montgomerycountymd.gov.

SECTION 1. INTENT

1.1 Background

The Montgomery County Council is interested in retaining the services of a qualified staff assistant to provide administrative support to a Councilmember's office consistent with the Scope of Work. The assistant will provide services approximately 25-30 hours per week, depending upon the needs of the Councilmember's office.

1.2 Solicitation Goals

To assist a County Councilmember office with staff and scheduling services.

SECTION 2. SCOPE OF WORK

2.1 General Requirements

The contractor will be expected to provide services for approximately 25-30 hours per week for the duration of the contract.

2.2 Service Requirements

- Maintain the Councilmember's calendar.
- Schedule meetings and events.
- Intake calls and correspondence from residents, resident groups, County government officials, and business organizations.
- Assure quality, completeness, and timeliness of correspondence and reports.
- Utilize and maintain databases.
- Order office supplies.
- Attend meetings and public events with the Councilmember or senior staff to provide administrative support.

2.3 Performance Metrics and Contract Management

Performance will be monitored and evaluated by the Councilmember's Chief of Staff. Performance will be based on how well the requirements listed in Section 2.2 are executed.

2.4 Contractor Qualifications

2.4.1 Mandatory Qualifications

- Completion of at least four (4) years of college, or an equivalent combination of education and experience.
- Experience prioritizing schedule requests and managing an office calendar.
- Experience in setting priorities and organizing work assignments within deadlines.
- Demonstrated experience with direct public contact in a busy setting dealing with diverse types of people and the ability to communicate tactfully and effectively with people, both orally and in writing.

- Experience in working effectively with a diverse set of constituents, particularly with the African-immigrant community, community groups, and elected and appointed officials. Fluency in Amharic is a plus.
- Experience with or ability to learn: Google Suite, Zoom, Microsoft Office Products including Teams, constituent correspondence systems, Canva, and social media applications.

2.4.2 Preferred Qualifications

- Fluency in Amharic

2.5 Contractor's Responsibilities

- Maintain the confidentiality of individually identifiable information and any other privileged or confidential information obtained, accessed, or reviewed in the course of your time with the Council.
- follow all applicable laws, policies, and procedures of the County government, the County Council, and the Councilmember's office.

2.6 County's Responsibilities

The Councilmember's office will provide general supervision of the Staff Assistant.

2.7 Reports and Deliverables

Any required reports will be provided by the Contractor within the Scope of Services and at the direction of the Councilmember's Chief of Staff.

SECTION 3. SUBMISSION INSTRUCTIONS

3.1 Proposal Submissions

Failure of an offeror to submit all required proposal submissions may render its proposal unacceptable as determined by the Director, Office of Procurement.

Offerors must submit their proposal electronically to [Stephen Mathany](#) by the due date and time stated in the Notice of Informal Solicitation. You may contact Stephen.Mathany@Montgomerycountymd.gov to confirm receipt of your proposal prior to the due date and time. Proposals received after the due date and time will not be considered under any circumstances, regardless of time sent.

Proposals will be evaluated only on material submitted. The offeror must submit sufficient information to enable the evaluation of the offeror's capabilities and experience. Proposals must include the following information (with labeled sections numbered as shown):

- A **cover letter** with a brief description of the firm, including the offeror's name, address, telephone number, and email address.
- The completed **Acknowledgment Page** of this solicitation, signed by a person authorized to bind the offeror to the proposal (see Attachment B).
- 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 (see Attachment C).

- If this solicitation is subject to the **Wage Requirements Law Certification** (see Notice of Informal Solicitation), the offeror must submit the appropriate [Wage Requirements Law forms](#). Failure to submit the required information may cause the offeror's proposal to be unacceptable and rejected.
- The [Minority, Female, Disabled-Owned Business \(MFD\) Program Subcontractor Performance Plan](#). This plan must be submitted with the offeror's proposal to ensure a contract can move forward.
- Cost Proposal (Attachment D).

3.2 Award Submissions

Prior to the execution of a contract, the following items must be submitted:

- The [Minority, Female, Disabled-Owned Business \(MFD\) Program Subcontractor Performance Plan](#) (for contract value greater than \$50,000).
- Certificate of Insurance (see Attachment E).
- If this solicitation is subject to the Wage Requirements Law, the awardee must submit the [Certification of Posting the Wage Requirements Notice](#).

SECTION 4. EVALUATION CRITERIA AND METHOD OF AWARD

4.1 Evaluation Criteria

The Evaluation Committee (EC) will evaluate the proposals based on the following criteria:

4.1.1 Written Evaluation Criteria

Evaluation Criteria	Points
Overall quality, clarity, and responsiveness of the proposal and understanding of the work to be performed in accordance with the Council's needs.	25
Demonstrated experience prioritizing schedule requests and managing an office calendar.	20
Demonstrated experience with direct public contact in a busy setting dealing with diverse types of people and the ability to communicate tactfully and effectively with people, both orally and in writing.	10
Demonstrated experience in working effectively with constituents, community groups, and elected and appointed officials.	15
Demonstrated experience with Google Suite, Zoom, Microsoft Office Products including Teams, constituent correspondence systems, Canva, and social media applications.	10
Demonstrated experience in setting priorities and organizing work assignments within deadlines.	10

Cost Proposal (Attachment D)	10
Highest possible score for written proposal evaluation	100

4.1.2 Interview Evaluation Criteria (If Applicable)

Evaluation Criteria	Points
Overall quality, clarity, and responsiveness of the proposal and understanding of the work to be performed in accordance with the Council's needs.	25
Demonstrated experience prioritizing schedule requests and managing an office calendar.	20
Demonstrated experience with direct public contact in a busy setting dealing with diverse types of people and the ability to communicate tactfully and effectively with people, both orally and in writing.	10
Demonstrated experience in working effectively with constituents, community groups, and elected and appointed officials.	10
Demonstrated fluency in Amharic.	5
Demonstrated experience with Google Suite, Zoom, Microsoft Office Products including Teams, constituent correspondence systems, Canva, and social media applications.	10
Demonstrated experience in setting priorities and organizing work assignments within deadlines.	10
Cost Proposal (Attachment D)	10
Highest possible score for interview evaluation	100

4.2 Selection and Award

- Upon receipt of proposals, the EC will review and evaluate all proposals in accordance with the evaluation criteria listed in Section 4.1, as well as review an offeror for responsibility.
- Interviews will be conducted with bidders who score 70 points or higher on the written proposal.
- The EC will make the award recommendation of the highest ranked offeror based on the combined written proposal and interview score.
- After the successful conclusion of negotiations, the using department will forward the contract to the Director, Office of Procurement who will execute the awarded contract.
- The County reserves the right to cancel the solicitation. If the Department decides to cancel the solicitation, the Department will notify the vendors via email.

SECTION 5. PERFORMANCE PERIOD

5.1 Term

The effective date of this Contract begins upon signature by the Director, Office of Procurement. The contract will automatically terminate once \$99,999 has been spent, or one year after the effective date, whichever occurs first. The contractor must perform all work in accordance with time periods stated in the Scope of Work. Before this term 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 renewal. The Director may exercise this option to renew this term two (2) time(s) for one (1) year(s) each, provided the \$99,999 contract cap has not been reached.

SECTION 6. COMPENSATION AND PRICE ADJUSTMENTS

6.1 Compensation

The Contractor will be paid in accordance with Click to add payment terms, within 30 days after the County's receipt and acceptance of a proper invoice submitted by the Contractor and in a form approved by the County.

All true and correct invoices and all inquiries regarding payment are to be sent to Cecily Thorne, Cecily.thorne@montgomerycountymd.gov. Failure to promptly comply with this requirement must delay payment.

6.2 Price Adjustments

- Prices quoted are firm for a period of one (1) year after execution of the contract. Any request for a price adjustment after this period is subject to the following:
 - Approval or rejection by the Director, Office of Procurement or designee.
 - Must be submitted in writing to the Director, Office of Procurement, accompanied by supporting documentation justifying the Contractor's request. A request may not be approved unless the contractor submits sufficient justification that the request is based on a net increase in costs in delivering the goods/services under the contract.
 - Submission within sixty (60) days prior to contract expiration date, if the contract is amended.
 - The County will not approve a price adjustment request that exceeds the annual percentage change of the Consumer Price Index (CPI) for the twelve-month period immediately prior to the date of the request, based on the CPI for all urban consumers issued for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan area by the United States Department of Labor, Bureau of Labor Statistics for ALL ITEMS.
 - The County will approve only one price adjustment for each contract term, if approved.
 - Should be effective sixty (60) days from the date of receipt of the contractor's request.
 - The price adjustment, including its effective date, must be incorporated into a written contract amendment.

SECTION 7. CONTRACT ADMINISTRATOR

7.1 Authority

The Director, Office of Procurement, is the delegated contracting officer. Therefore, the Director, Office of Procurement, must approve amendments, modifications, or changes to the terms, conditions, or minority, female, and disabled subcontractor plans in writing.

7.2 Duties

The contract administrator's duties are defined in the General Conditions of Contract between County & Contractor (See Attachment A). The Contract Administrator, or designee, is responsible for inspecting all work and authorizing payment upon acceptance.

7.3 Contact

The Contract Administrator for any contract resulting from this solicitation is Sandra Marin, and they can be contacted via phone at (240)777-7923 or via email at Sandra.marin@montgomerycountymd.gov.

SECTION 8. SPECIAL TERMS AND CONDITIONS

8.1. General Conditions

The General Conditions of Contract between County & Contractor (Attachment A) are incorporated and made part of this solicitation and any resultant contract.

8.2. Independent Contractor/Contractor Conduct

- A. For the purposes of this Contract, the Contractor's personnel and the personnel retained by any approved subcontractor engaged by the Contractor are the employees, consultants, workers and contractors of the Contractor or subcontractor, as applicable. The Contractor's personnel and the personnel of any subcontractor engaged by the Contractor are not employees of Montgomery County. The Contractor's personnel and the personnel of any subcontractor engaged by the Contractor must not represent themselves as an employee of the County in their interaction with the public, other contractors, or County employees. In situations where the Contractor's personnel or the personnel of any subcontractor engaged by the Contractor may be mistaken for a County employee, the Contractor's personnel and the personnel of any subcontractor engaged by the Contractor must disclose that they are working under a County contract and that they are not a County employee. Persons assigned to work for the County under this Contract must not set policies for the County or independently interpret County policies.
- B. The Contractor must provide administrative oversight for, and coordinate the recruitment, hiring/subcontracting, termination and placement of, qualified individuals who will provide the services as stipulated in this Contract. The Contractor must also provide overall supervision, control over, and direction of all personnel who work under this Contract in the provision of the services described in this Contract.
- C. The Contractor and any subcontractor engaged by the Contractor must abide by all federal, state and local labor laws and regulations and all applicable federal, state, and local tax laws and regulations in the hiring and management of all personnel employed or retained to provide services to the County under this Contract. For purposes of this Contract, "personnel" means the employees, consultants, contractors, or other worker retained by the Contractor or any subcontractor engaged by the Contractor to provide the services under this Contract.
- D. The Contractor or any subcontractor engaged by the Contractor, as applicable, must be responsible for all taxes, as well as other obligations or benefits related to its workers, including F.I.C.A., federal, and state withholdings, unemployment, and workers' compensation for persons who work

for the Contractor or the subcontractor engaged by the Contractor under this Contract in the provision of the services described in this Contract.

- E. The Contractor's personnel and the personnel of any subcontractor engaged by the Contractor to provide services under this Contract are not entitled to the use of, and must not use, County vehicles.
- F. The Contractor's personnel and the personnel of any subcontractor engaged by the Contractor are not entitled to benefits available to County employees, including but not limited to credit union membership, administrative leave, access to deferred compensation benefits, affirmative action initiatives, personnel services, employee training, and other County employee benefits.
- G. The Contractor or any subcontractor engaged by the Contractor, as applicable, is solely responsible for all costs or expenses related to personnel costs of its personnel, including those related to wages, benefits, training, mileage, travel, parking, fringe benefits and paid leave.
- H. Upon request by the County, the Contractor must provide the County with access to any materials, records or reports produced by any of the Contractor's or the subcontractor's personnel, including, but not limited to pamphlets, surveys, evaluations, training materials and customized software. Any materials, records, or reports produced by the Contractor's personnel or the personnel of any subcontractor engaged by the Contractor performing work under this Contract are the County's property.
- I. The County will own all work products produced by the Contractor or any subcontractor engaged by the Contractor to provide services under this Contract when those work products are produced: 1) while assigned to the County Contract; 2) during the time and/or in the space used for County contract work; and 3) within the general scope of work assigned under the Contract. The County has the sole right to own, license, sell or use such work products. The Contractor's or subcontractor's personnel, and the personnel of any contractor or subcontractor engaged by the Contractor will have no such rights to work products produced for the County.
- J. All original content and work products developed under this Contract, including, but not limited to, graphics, data, content, information, photos and other products developed as a result of the work performed under the Contract are the sole and exclusive property of Montgomery County, Maryland; are for the exclusive, unlimited use of the County; and must not be used or distributed by the Contractor without prior written permission of the County.
- K. The Contractor must: ensure that any third-party references, graphics, or resource materials used are royalty-free; have licenses for use of such materials when applicable; and properly credit such materials to their source when so required by the source.
- L. The Contractor must not use, publish, or release any information relative to the Contract without the prior written approval of the Contract Administrator, including, but not limited to, mailing lists, brochures, pamphlets, catalogs, data, drawings, photos, reports, video or media clips, descriptions and correspondence. Any such information generated by the Contractor specifically for use in performing the work under the Contract must not be issued, published, or released by the Contractor without prior written consent of the Contract Administrator.

8.3. Purchase of Goods by Non-Profit Organizations

Pursuant to the requirements set forth in the Montgomery County Code, Chapter 11B-49, the Contractor agrees to extend the same terms, conditions, and prices for the goods provided by the Contractor pursuant to this contract to those Non-Profit organizations which may need the goods in order to perform a contract with the County. Non-Profit Organizations are defined as those organizations that are exempt from taxation under Section 501(c)(3) of the Internal Revenue Code but are not defined as a "public entity" under subsection (n) of Chapter 11B-1 of the Montgomery County Code.

8.4. Travel Time

No payment for travel time to or from a job site shall be charged. Charges begin when the Contractor arrives at each job site and end when the Contractor leaves each job site. The Project Coordinator or Contract Administrator will verify time records.

SECTION 9. ETHICS

As a result of being awarded a contract resulting from this solicitation, the successful Contractor may be ineligible for the award of related contracts. In this regard, Montgomery County Code Sections 11B-52 (b) and (c) state the following:

A Contractor providing an analysis or recommendation to the County concerning a particular matter must not, without first obtaining the written consent of the Chief Administrative Officer:

- *Assist another party in the matter or another person if the person has a direct and substantial interest in the matter; or*
- *Seek or obtain economic benefit from the matter in addition to payment to the contractor by the County.*

SECTION 10. INSTRUCTIONS, CONDITIONS AND NOTICES

10.1 Instructions

10.1.1. Registered Vendor

The first step in doing business with Montgomery County is to become a registered vendor in the online County Vendor Registration System (CVRS). Go to: [Montgomery County Vendor Registration System](#)

10.1.2. Acknowledgement

The offeror must include the signed Acknowledgment page indicating agreement with all the provisions, terms, and conditions of this solicitation (see Attachment B).

10.1.3. Pre-Submission Conference

If a pre-submission conference is held, it is recommended that prospective offerors attend. For information regarding the date, time, and place of the conference, please see the Notice of Informal Solicitation on page 1 of this solicitation.

10.1.4. Proposals

The offeror must submit their proposal electronically to [Click to add information](#). Proposals received after the date and time specified will not be considered.

It is the offeror's responsibility to ensure proper submission by the deadline.

10.1.5. Proposal Withdrawal/Modification

The offeror may withdraw and make edits to a proposal before the solicitation's closing date and time by contacting [Click to add contract information](#). Withdrawal and resubmission must occur before the closing date and time.

10.1.6. Questions

All technical and procurement questions pertaining to this solicitation are to be directed to the individuals identified in the Notice of Informal Solicitation on page 1.

The Office of Procurement has an electronic [Frequently Asked Questions](#) section on its website that may answer your questions.

10.1.7. Obtaining Solicitation Amendments

When the County determines that material changes to the solicitation are necessary, the County Department will issue a formal amendment. Only amendments issued by the County are binding. Verbal explanations or instructions given by a County employee are not binding.

Offerors must acknowledge receipt of any and all solicitation amendments (see Attachment B).

10.1.8. Verbal Explanations

Verbal explanations or instructions given by a Montgomery County employee to an offeror in regard to this Informal Solicitation will not be binding on the County. Any information given to an offeror, in response to a request, will be furnished to all offerors in a Solicitation Amendment to this Informal Solicitation, 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 amendments issued by the County Department will be considered as being binding on the County.

10.1.9. Maryland State Department of Assessments & Taxation (MD-SDAT)

Contractors doing business in the State of Maryland are required to be in 'Good Standing' with MD-SDAT. The County will verify this status and cannot enter into a contract with a firm that has a 'Forfeit' status until the status is rectified. Information can be found at [MD-SDAT](#).

10.2 Conditions

10.2.1. Determination of Responsibility

The Offeror has the burden of demonstrating, affirmatively, its responsibility in connection with this solicitation. The County reserves the right to consider an offeror non-responsible who has previously failed to perform properly, complete contracts in a timely manner, or if investigation shows the offeror is unable to perform the requirements of the contract.

10.2.2. Late Proposals

Proposals received after the due date and time specified in the solicitation are considered late and will not, under any circumstances, be considered for any award resulting from the solicitation.

10.2.3. Minority, Female, Disabled-Owned Business (MFD) Program Compliance

Under County law, this solicitation is subject to the Montgomery County Code (Part II. Chapter 11B. Article XIV) and the Montgomery County Procurement Regulations (COMCOR 11B.00.01.07) regarding

participation in the Minority-Female-Disabled Person (MFD) procurement program. Information regarding the County's [MFD program](#) can be found on the Office of Procurement website.

10.2.4. Montgomery County Code and Procurement Regulations

The Montgomery County and Procurement Regulations are applicable to this solicitation and any contract awarded pursuant to this solicitation.

10.2.5. Name and Signature Requirements for Proposals and Contracts

The correct and full legal business name of the entity involved must be used on proposals received and on contract(s) issued as a result of this solicitation. A trade name, i.e., a shortened or different name under which the firm does business, must not be used when the full legal name is different. Corporations must have names that comply with State law, which requires a suffix indicating the corporate status of that business (e.g., Inc., Incorporated, etc.). Trade names may be indicated by individuals or corporations with the individual or corporate name followed by "t/a" (trading as) or "d/b/a" (doing business as), respectively. The signature on the bid, contract, amendment, or related correspondence must conform to the following:

All signatures must be made by an authorized officer, partner, manager, member, or employee. The signing of an offer or a contract is a representation by the person signing that the person signing is authorized to do so on behalf of the offeror or contractor.

No proposals will be accepted unless submitted in ink or typewritten. Changes made to the prices prior to the opening must be done legibly and initialed by the offeror making the changes.

10.2.6. Qualification of Offerors

Offerors may be required to furnish satisfactory evidence that they are qualified dealers or manufacturers of the items listed or are regularly engaged in performing the services on which they are submitting a proposal, and in both cases maintain a regularly established place of business. An authorized representative of the County may visit and inspect any prospective Contractor's plant, manufacturing facility or place of business, etc. where the goods, services or construction are performed to determine ability, capacity, reliability, financial stability, and other factors necessary to perform the contract.

10.3 Notices

10.3.1. Award or Rejection of Offers

The County reserves the right to accept or reject any or all offers, or portions thereof, to waive minor irregularities and to award the Contract in the best interests of the County. Conditional or qualified proposals are subject to rejection. The County reserves the right to reject the offer of an offeror who has previously failed to perform properly or to complete in a timely manner, contracts of a similar nature, or if investigation shows the offeror is unable to perform the requirements of the contract.

10.3.2. Proprietary & Confidential Information

The County has unlimited data rights regarding proposals submitted in response to its solicitations. Information that is deemed confidential commercial or financial information, as defined by the Maryland Public Information Act (MPIA), will be exempted from disclosure if the offeror can demonstrate the information is customarily and actually treated as private and was provided under an assurance of privacy.

It is the responsibility of the offeror to clearly identify each part of the offer that it believes is confidential by stamping the bottom right-hand corner of each pertinent page with large boldface letters stating “confidential” or “proprietary.”

10.3.3. Proposal Preparation Expenses

All costs incurred in the preparation and submission of a proposal will be borne by the offeror and shall not be incurred in anticipation of receiving reimbursement from the County.

10.3.4. Tie Scoring

In case of a tie in the numerical scoring, the tie will be resolved by offering the proposed contract to the offeror who has its principal place of business in Montgomery County, Maryland, in accordance with the criteria stated under Procurement Regulation 4.1.2.4(f).

10.3.5. Health Insurance Preference

Only a proposal from a Certified Small Business with Health Insurance that submits a certificate issued by Montgomery County Department of Health and Human Services at the date and time of proposal submission will receive the applicable evaluation factor, in accordance with Procurement Regulation 11B.77.01.06.

ATTACHMENT A.
MONTGOMERY COUNTY, MARYLAND GENERAL TERMS AND CONDITIONS OF CONTRACT

1. DEFINITIONS. As used in this Contract, the following words have the following meanings:

- 1.1. **“County Data”** means all data created by or in any way originating with the County, and all data that is the output of computer processing of or other electronic manipulation of any data that was created by or in any way originated with the County, whether such data or output is stored on the County’s hardware, the Contractor’s hardware or exists in any system owned, maintained or otherwise controlled by the County or by the Contractor.
- 1.2. **“Contractor Data”** means all data created by or in any way originating with the Contractor, and all data that is the output of computer processing of or other electronic manipulation of any data that was created by or in any way originated with the Contractor, whether such data or output is stored on the County’s hardware, the Contractor’s hardware or exists in any system owned, maintained or otherwise controlled by the County or by the Contractor.
- 1.3. **“Data Breach”** means the unauthorized access of Personal Information (PI), Individually Identifiable Health Information, and/or non-public County Data in the possession of the Contractor by a non-authorized person(s).
- 1.4. **“Deliverable”** means any of the goods, services, documents and/or materials including, but not limited to, software, reports, drawings, studies, specifications, estimates, tests, maps, photographs, designs, graphics, mechanical, artwork, computations, and data created and/or provided by Contractor or its subcontractor(s) specifically for the County under a contract.
- 1.5. **“Individually Identifiable Health Information”** means information that is a subset of health information, including demographic information collected from an individual, and:
 - 1.5.1. is created or received by a health care provider, health plan, employer or health care clearinghouse; and
 - 1.5.2. relates to the past, present or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present or future payment for the provision of health care to an individual; and
 - 1.5.2.1. that identifies the individual; or
 - 1.5.2.2. with respect to which there is a reasonable basis to believe the information can be used to identify the individual.
- 1.6. **“Personal Information (PI)”** means personal data as defined in the Protection of Information by Government Agencies Act, currently found at MD Code Ann., State Government, §10-1301(c), as amended.
- 1.7. **“Protected Health Information” (PHI)** means individually identifiable health information transmitted by electronic media, maintained in electronic media, or transmitted or maintained in any other form or medium. PHI excludes education records covered by the Family Educational Rights and Privacy Act (FERPA), as amended, 20 U.S.C. 1232g, records described at 20 U.S.C. 1232g(a)(4)(B)(iv) and employment records held by a covered entity in its role as employer.
- 1.8. **“Security Incident”** means the potentially unauthorized access by a non-authorized person(s) to Personal Information (PI), Individually Identifiable Health Information, and/or non-public County Data that the Contractor believes could reasonably result in the use,

disclosure or theft of such information within the possession or control of the Contractor. A security incident may or may not turn into a Data Breach.

2. ACCOUNTING SYSTEM, ACCURATE INFORMATION, AND AUDIT.

- 2.1. The Contractor certifies that all information the Contractor has provided or will provide to the County is true and correct and can be relied upon by the County in awarding, modifying, making payments, or taking any other action with respect to this contract including resolving claims and disputes.
- 2.2. Any false or misleading information is a ground for the County to terminate this contract for cause and to pursue any other appropriate remedy. The Contractor certifies that the Contractor's accounting system conforms with generally accepted accounting principles, is sufficient to comply with the contract's budgetary and financial obligations and is sufficient to produce reliable financial information.
- 2.3. The County may examine the Contractor's and any first-tier subcontractor's records to determine and verify compliance with the contract and to resolve or decide any claim or dispute arising under this contract. The Contractor and any first-tier subcontractor must grant the County access to these records at all reasonable times during the Contract term and for 3 years after final payment. If the contract is supported to any extent with federal or state funds, the appropriate federal or state authorities may also examine these records. The Contractor must include the preceding language of this paragraph in all first-tier subcontracts.

3. ASSIGNMENTS AND SUBCONTRACTS.

- 3.1. The Contractor must not assign or transfer this contract, any interest herein or any claim hereunder, except as expressly authorized in writing by the Director, Office of Procurement. Unless performance is separately and expressly waived in writing by the Director, Office of Procurement, an assignment does not release the Contractor from responsibility for performance of this contract.
- 3.2. The Contractor must identify all of its strategic business partners related to services provided under this contract, including but not limited to all subcontractors or other entities or individuals who may be a party to a joint venture or similar agreement with the Contractor, and who will be involved in any application development and/or operations.
- 3.3. Any subcontract for any work hereunder must comport with the terms of this contract and County law and must include any other terms and conditions that the County deems necessary to protect its interests. The Contractor must not employ any subcontractor that is a debarred or suspended person under County Code §11B-37. The Contractor is fully responsible to the County for the acts and omissions of itself, its subcontractors and any persons either directly or indirectly employed by them. Nothing contained in the Contract documents creates any contractual relation between any subcontractor and the County, and nothing in the contract documents is intended to make any subcontractor a beneficiary of the contract between the County and the Contractor.

4. CHANGES.

- 4.1. The Director, Office of Procurement, may unilaterally change the work, materials and services to be performed, upon a finding that such change is in the best interests of the County. The change must be in writing and within the general scope of the contract. The contract will be modified to reflect any time or money adjustment the Contractor is entitled to receive. Contractor must bring to the Contract Administrator, in writing, any claim about an

adjustment in time or money resulting from a change, within 30 days from the date the Director, Office of Procurement, issued the change in work, or the claim is waived. Any failure to agree upon a time or money adjustment must be resolved under the "Disputes" clause of this contract. The Contractor must proceed with the prosecution of the work as changed, even if there is an unresolved claim. No charge for any extra work, time or material will be allowed, except as provided in this section.

5. COMPLIANCE WITH APPLICABLE LAWS.

- 5.1. Contractor must comply with all applicable Federal, State, County, and local laws and regulations including, but not necessarily limited to, the ones listed herein. The Contractor must, without additional cost to the County, pay any necessary fees and charges, obtain any necessary licenses and permits, and comply with applicable federal, state and local laws, codes and regulations.
- 5.2. Americans With Disabilities Act. The Contractor agrees to comply with the nondiscrimination requirements of Titles I and II, and other provisions, of the Americans with Disabilities Act of 1990, Pub. Law 101-336, and ADA Amendments Act of 2008, Pub. Law 110-325, as amended, currently found at 42 U.S.C., § 12101, et seq., and 47 U.S.C., ch. 5, and, without limitation, 28 C.F.R. § 35.200 et seq.
- 5.3. Accessibility of Web Content and Mobile Applications.
 - 5.3.1. Contractor warrants that any information technology it provides to or develops for the County under this contract complies fully with Americans with Disability Act accessibility requirements for online content and mobile applications, as set forth at 28 C.F.R. 35.200.
 - 5.3.2. Contractor must make available its current Voluntary Product Accessibility Template ("VPAT"), which describes the extent to which the application conforms to Level A and Level AA success criteria and conformance requirements specified in WCAG 2.1, and must update such VPAT from time to time in accordance with its standard practices and not less than annually. Contractor must also provide copies of its VPAT upon County request.
 - 5.3.3. The Contractor's services must comply in all material respects with Web Content Accessibility Guidelines (WCAG) 2.1 Level AA success criteria and conformance requirements. Contractor's conformance to WCAG 2.1, Level AA is a material contractual obligation.
 - 5.3.4. In the event the County receives any complaints or has concerns regarding the accessibility of the Contractor's services, the Contractor must promptly provide the County with a written response outlining its plan to address such complaints or concerns or must provide written notice that it is unable to resolve them. The Contractor must address such complaints or concerns and must communicate regularly and promptly with the County regarding the status of any remediation efforts.
- 5.4. Displaced Service Workers Protection Act. The Contractor agrees to comply with the requirements of the Displaced Service Workers Protection Act, which appears in County Code, Chapter 27, Human Rights and Civil Liberties, Article X, Displaced Service Workers Protection Act, §§ 27-64 through 27-66.
- 5.5. Earned Sick and Safe Leave. Montgomery County's Earned Sick and Safe Leave Law, found at Sections 27-76 through 27-82 of the County Code, became effective October 1,

2016. An employer doing business in the County, as defined under the statute, must comply with this law. This includes an employer vendor awarded a County contract. A vendor may obtain information regarding this law at <http://www.montgomerycountymd.gov/humanrights/>.

5.6. Ethics Requirements/Political Contributions.

- 5.6.1. The Contractor must comply with the ethics provisions contained in Chapters 11B and 19A of the Montgomery County Code, which include the following:
 - 5.6.1.1. a prohibition against making or offering to make certain gifts. Section 11B-51(a).
 - 5.6.1.2. a prohibition against kickbacks. Section 11B-51(b).
 - 5.6.1.3. a prohibition against a person engaged in a procurement from employing or offering to employ a public employee. Section 11B-52 (a).
 - 5.6.1.4. a prohibition against a contractor that is providing a recommendation to the County from assisting another party or seeking to obtain an economic benefit beyond payment under the contract. Section 11B-52 (b).
 - 5.6.1.5. a restriction on the use of confidential information obtained in performing a contract. Section 11B-52 (c).
 - 5.6.1.6. a prohibition against contingent fees. Section 11B-53.
- 5.6.2. Through signature of this contract, the contractor certifies that the contractor has filed an initial statement with the Maryland State Board of Elections in compliance with MD Code Ann., Election Law, §14-104(b)(1), or is not required to file an initial statement as per MD Code Ann., Election Law, §14-104(c)(2).
- 5.6.3. Hazardous and Toxic Substances. Manufacturers and distributors are required by federal "Hazard Communication" provisions (29 CFR 1910.1200), and the Maryland "Access to Information About Hazardous and Toxic Substances" Law, to label each hazardous material or chemical container, and to provide Material Safety Data Sheets to the purchaser. The Contractor must comply with these laws and must provide the County with copies of all relevant documents, including Material Safety Data Sheets, prior to performance of work or contemporaneous with delivery of goods.
- 5.6.4. Immigration Reform and Control Act. The Contractor warrants that both the Contractor and its subcontractors do not, and will not, hire, recruit or refer for a fee, for employment under this Contract or any subcontract, an alien while knowing the alien is an unauthorized alien, or any individual without complying with the requirements of the federal Immigration and Nationality laws, including any verification and record keeping requirements. The Contractor further assures the County that, in accordance with those laws, it does not, and will not, discriminate against an individual with respect to hiring, recruitment, or referral for a fee, of an individual for employment or the discharge of an individual from employment, because of the individual's national origin or, in the case of a citizen or prospective citizen, because of the individual's citizenship status.
- 5.6.5. Intergovernmental Purchasing. Certain non-profit and governmental entities may purchase supplies and services, similar in scope of work and compensation amounts provided for in a County contract, using their own contract and

procurement laws and regulations, pursuant to Md. Code Ann., State Fin. and Proc., §13-110(c).

- 5.6.6. Non-Conviction of Bribery. The Contractor hereby declares and affirms that, to its best knowledge, none of its officers, directors, or partners or employees directly involved in obtaining contracts has been convicted of bribery, attempted bribery, or conspiracy to bribe under any federal, state, or local law.
- 5.6.7. Non-Discrimination in Employment. The Contractor agrees to comply with the non-discrimination in employment policies and/or provisions prohibiting unlawful employment practices in County contracts as required by Section 11B-33 and Section 27-19 of the Montgomery County Code, as well as all other applicable state and federal laws and regulations regarding employment discrimination.
 - 5.6.7.1. The Contractor assures the County that, in accordance with applicable law, it does not, and will not, discriminate in any manner on the basis of race, color, religious creed, ancestry, national origin, age, sex, marital status, disability, or sexual orientation.
 - 5.6.7.2. The Contractor must bind its subcontractors to the provisions of this section.
- 5.6.8. No Retaliation. Contractor and all of its subcontractors must comply with the provisions of County Code §11B-35A and must not retaliate against a covered employee who discloses an illegal or improper action described in §11B-35A. Furthermore, an aggrieved covered employee under §11B-35A is a third-party beneficiary under this Contract, who may by civil action recover compensatory damages including interest and reasonable attorney's fees, against the contractor or one of its subcontractors for retaliation in violation of that Section.
- 5.6.9. Prevailing Wage. The County's prevailing wage law, as found at §11B-33C of the County Code, applies to certain construction and mechanical systems service contracts. To the extent applicable, the County's prevailing wage requirements are enumerated within the "Prevailing Wage Requirements for Construction Contract Addendum to the General Conditions of Contract between County and Contractor." If applicable to this contract, the Addendum will be attached to the contract, and will be incorporated herein by reference, and made a part thereof.
- 5.6.10. Workplace Safety. The Contractor must ensure adequate health and safety training and/or certification, and must comply with applicable federal, state and local Occupational Safety and Health laws and regulations.

6. CONFIDENTIAL AND PROPRIETARY INFORMATION AND MATERIALS.

- 6.1. Subject to the Maryland Public Information Act (Md. Code Ann., Gen. Prov. §4-101, et. seq.) and any other applicable laws including, without limitation, HIPAA, the HI-TECH Act, and the Maryland Medical Records Act and regulations promulgated pursuant thereto, all confidential or proprietary information and documentation relating to either party (including without limitation, any information or data stored within the Contractor's computer systems or cloud infrastructure, if applicable) must be held in confidence by the other party. Each party is, however, permitted to disclose, as provided by and consistent with applicable law, relevant confidential information to its personnel and agents to the extent that such disclosure is necessary for the performance of their duties under this contract.

- 6.2. Each party must advise each of its personnel and agents to whom any of the other party's confidential information is to be disclosed of the obligations hereunder.
- 6.3. The provisions of this Section do not apply to information that: (a) is lawfully in the public domain; (b) has been independently developed by the other party without violation of this contract; (c) was already rightfully in the possession of such party; (d) was supplied to such party by a third party lawfully in possession thereof and legally permitted to further disclose the information; or (e) which such party is required to disclose by law.

7. CONSTRUCTION, CONFLICTING TERMS, AND VENUE.

- 7.1. This contract must be construed in accordance with the laws and regulations of Maryland and Montgomery County. The Montgomery County Procurement Regulations are incorporated by reference into, and made a part of, this contract. In the case of any inconsistency between this contract and the Procurement Regulations, the Procurement Regulations govern.
- 7.2. Notwithstanding any provisions to the contrary in any contract terms or conditions supplied by the Contractor, and in the event of any inconsistency, these General Terms and Conditions of Contract, together with any Addenda thereto, supersede any terms and conditions supplied by the Contractor.
- 7.3. For purposes of litigation involving this contract, except for contract Disputes discussed in Section 11, Disputes, below, exclusive venue and jurisdiction must be in the Circuit Court for Montgomery County, Maryland or in the District Court of Maryland for Montgomery County.

8. CONTRACT ADMINISTRATION.

- 8.1. The County's contract administrator is the Department representative designated by the Director, Office of Procurement, in writing, and is authorized to:
 - 8.1.1. serve as liaison between the County and the Contractor;
 - 8.1.2. give direction to the Contractor to ensure satisfactory and complete performance;
 - 8.1.3. monitor and inspect the Contractor's performance to ensure acceptable timeliness and quality;
 - 8.1.4. serve as records custodian for this contract, including wage and prevailing wage requirements;
 - 8.1.5. accept or reject the Contractor's performance;
 - 8.1.6. furnish timely written notice of the Contractor's performance failures to the Director, Office of Procurement, and to the County Attorney, as appropriate;
 - 8.1.7. prepare required reports;
 - 8.1.8. approve or reject invoices for payment;
 - 8.1.9. recommend contract modifications or terminations to the Director, Office of Procurement;
 - 8.1.10. issue notices to proceed; and
 - 8.1.11. monitor and verify compliance with any MFD Performance Plan.
- 8.2. The contract administrator is NOT authorized to make determinations (as opposed to recommendations) that alter, modify, terminate or cancel the contract, interpret ambiguities in contract language, or waive the County's contractual rights.

9. COST AND PRICING DATA.

- 9.1. Chapter 11B of the County Code and the Montgomery County Procurement Regulations require that cost and pricing data be obtained from proposed awardees/contractors in certain situations. The Contractor guarantees that any cost and pricing data provided to the County will be accurate and complete. The Contractor grants the Director, Office of Procurement, access to all books, records, documents, and other supporting data in order to permit adequate evaluation of the contractor's proposed price(s). The Contractor also agrees that the price to the County, including profit or fee, may, at the option of the County, be reduced to the extent that the price was based on inaccurate, incomplete, or noncurrent data supplied by the contractor

10. DISPUTES.

- 10.1. Any dispute arising under this contract that is not disposed of by agreement must be decided under the Montgomery County Code and the Montgomery County Procurement Regulations. Pending final resolution of a dispute the Contractor must proceed diligently with contract performance.
- 10.2. Subject to subsequent revocation or alteration by the Director, Office of Procurement, the head of the County department, office or agency ("Department Head") of the contract administrator is the designee of the Director, Office of Procurement, for purposes of dispute resolution. The Department Head, or his/her designee, must forward to the Director, Office of Procurement, a copy of any written resolution of a dispute. The Department Head may delegate this responsibility to another person (other than the contract administrator).
- 10.3. The Contractor must notify the County's contract administrator of a claim in writing and must make a good faith effort to resolve a claim with the contract administrator prior to filing a dispute with the Director, Office of Procurement or designee.
- 10.4. The Contractor must file a dispute with the Director within 30 days of the event giving rise to the claim (unless the contract provides otherwise), whether or not the contract administrator has responded to the written notice of claim or resolved the claim. The Contractor waives any dispute not timely filed. The Director, Office of Procurement, must dismiss a dispute that is not timely filed.
- 10.5. A dispute must be in writing, for specific relief, and any requested relief must be fully supported by affidavit of all relevant calculations, including cost and pricing information, records, and other information necessary for determination of the dispute. All relevant documentation must be provided with the written dispute.
- 10.6. If the Director denies a dispute, in whole or in part, the Contractor may file a contract dispute appeal with the County's Chief Administrative Officer (CAO). The dispute appeal must be filed within 30 days after the party receives the Director's decision. If no decision is rendered by the Director within 45 days of the Director's receipt of the dispute, and the parties have not agreed to an extension of time, then the dispute appeal must be filed within 75 days after the party filed the dispute. Upon receipt of the contract dispute appeal, the CAO must review the dispute de novo, but the CAO must not consider any grounds except those presented by the filing party in the initial dispute filing. The dispute appeal must identify the relief sought and all grounds and materials supporting the request for relief. The appealing party must provide a copy of the dispute appeal to the opposing party, the Director and the County Attorney.
- 10.7. The Contractor may pursue judicial review of the final decision of the CAO to the Circuit Court in accordance with the Maryland Rules governing judicial review of administrative

agency decision (Maryland Rules 7-201, et. seq.) and as provided under Section 11B-35(d) of the Code. Either the Contractor or the County may appeal the Circuit Court's decision to the appellate courts of Maryland.

- 10.8. At the County's option, the Contractor agrees to be made a party to any related dispute involving another contractor.

11. DOCUMENTS, MATERIALS AND DATA – OWNERSHIP AND USE.

- 11.1. All documents, materials, and/or data generated as a result of this contract are the County's property. The County has the right to use and reproduce any documents, materials, and data, including confidential information, used in the performance of, or developed as a result of, this contract. The County may use this information for its own purposes, including reporting to state and federal agencies.
- 11.2. The Contractor must not access County user accounts or data, except:
- 11.2.1. as necessary to provide the goods and services described in this contract;
 - 11.2.2. as required by the express terms of this contract;
 - 11.2.3. in response to service or technical issues; or
 - 11.2.4. at the County's written request.
- 11.3. The Contractor warrants that it has title to or right of use of all documents, materials or data used or developed in connection with this contract. The Contractor must keep confidential all documents, materials, and data prepared or developed by the Contractor or supplied by the County. Except as may otherwise be set forth in this contract, Contractor must not use, sell, sub-lease, assign, give, or otherwise transfer to any third party any information or material provided to Contractor by the County or developed by Contractor relating to the contract.

12. DURATION OF OBLIGATION.

- 12.1. The Contractor agrees that all of Contractor's obligations and warranties, including all requirements imposed by the Minority Owned Business Addendum to these General Conditions, if any, which directly or indirectly are intended by their nature or by implication to survive Contractor performance, do survive the completion of performance, termination for default, termination for convenience, or termination by mutual consent of the contract.

13. ENTIRE AGREEMENT.

- 13.1. There are no promises, terms, conditions, or obligations other than those contained in this contract. This contract supersedes all communications, representations, or agreements, either verbal or written, between the parties hereto, with the exception of express warranties given to induce the County to enter into the contract.

14. GUARANTEE AND WARRANTY.

- 14.1. The Contractor guarantees all goods, services, and construction provided under the contract, including any products or materials used in the course of providing the goods, services, and/or construction. The Contractor further guarantees that all products offered (or used in the installation of those products) carry a guarantee and/or warranty against any and all defects. These guarantees are in effect for one year from the date of the County's acceptance of the goods, services or construction, unless a longer period is: (1) agreed upon by the Parties in the contract; (2) provided by the manufacturer; or (3) specified in the County's written solicitation.

- 14.2. The Contractor must correct any and all defects in material and/or workmanship that may appear during the guarantee period, or any defects that occur within one (1) year of acceptance even if discovered more than one (1) year after acceptance, by repairing, (or replacing with new items or new materials, if necessary) any such defect at no additional cost to the County and to the County's satisfaction.
- 14.3. Should a manufacturer's or service provider's warranty or guarantee exceed the requirements stated above, that guarantee or warranty will be the primary one used in the case of defect. Copies of manufacturer's or service provider's warranties must be provided upon request.
- 14.4. All warranties and guarantees must be in effect from the date of the County's acceptance of the goods, services, or construction.
- 14.5. Goods and materials provided under this contract must be of first quality, latest model and of current manufacture, and must not be of such age or so deteriorated as to impair their usefulness or safety. Items that are used, rebuilt, or demonstrator models are unacceptable, unless specifically requested by the County in the specifications.
- 14.6. The Contractor guarantees that all work will be accomplished in a workmanlike manner, and the Contractor must observe and comply with all Federal, State, County and local laws, ordinances and regulations in providing the goods and performing the services or construction.

15. GENERAL INDEMNIFICATION AND HOLD HARMLESS.

- 15.1. The Contractor is responsible for any loss, personal injury, bodily injury, death and any other damage (including incidental and consequential) that may be done or suffered by reason of the Contractor's negligence or failure to perform any contractual obligations. The Contractor must indemnify and save the County harmless from any loss, cost, damage and other expenses, including attorney's fees and litigation expenses, suffered or incurred due to the Contractor's negligence or failure to perform any of its contractual obligations. If requested by the County, the Contractor must defend the County in any action or suit brought against the County arising out of the Contractor's negligence, errors, acts or omissions under this contract. The negligence of any agent, subcontractor or employee of the Contractor is deemed to be the negligence of the Contractor. For the purposes of this paragraph, County includes its boards, agencies, agents, officials and employees.

16. INDEPENDENT CONTRACTOR.

- 16.1. The Contractor is an independent contractor. The Contractor and the Contractor's employees or agents are not agents of the County.

17. INSPECTIONS.

- 17.1. The County has the right to monitor, inspect and evaluate or test all supplies, goods, services, or construction called for by the contract at all reasonable places (including the Contractor's place of business) and times (including the period of preparation or manufacture).

18. INSURANCE.

- 18.1. Prior to contract execution by the County, the Contractor must obtain, at its own cost and expense, the minimum insurance specified by the County, with one or more insurance company(s) licensed or qualified to do business in the State of Maryland and acceptable to the County's Division of Risk Management. The minimum limits of coverage listed must not

be construed as the maximum as required by contract or as a limitation of any potential liability on the part of the Contractor to the County, nor is failure by the County to request evidence of this insurance in any way be construed as a waiver of Contractor's obligation to provide the insurance coverage specified.

- 18.2. Contractor must keep this insurance in full force and effect during the term of this contract, including all extensions. Prior to award of this contract, and prior to any contract modification extending the term of the Contract, and upon request by the County, the Contractor must submit to the Director, Office of Procurement, one or more Certificate(s) of Insurance, as evidence of compliance with this provision. If requested by the County, the Contractor must provide a copy of any and all insurance policies to the County.
- 18.3. The Contractor's insurance must be primary. Montgomery County, MD, including its officials, employees, agents, boards, and agencies, must be named as an additional insured on all liability policies where required by Minimum Insurance Requirements.
- 18.4. Contractor must provide to the County at least 30 days' written notice of a cancellation of, or a material change to, an insurance policy. A cancelled policy must be replaced with a new policy including the same insurance coverage(s) type and limits equal to or greater than the expired policy(s). A copy of the new Certificate of Insurance must be provided promptly to the County. In no event may the insurance coverage be less than that shown on the applicable Minimum Insurance Requirements documentation provided by the County.

19. INTELLECTUAL PROPERTY.

- 19.1. Ownership of all copyrights, patents, trademarks, trade secrets, and any other intellectual property existing prior to the Effective Date of this contract remains with the party that owned such rights immediately prior to the Effective Date ("Pre-Existing Intellectual Property").
- 19.2. If the Contractor will be preparing, providing, displaying, publicly performing, reproducing, or otherwise using, in any manner or form, any information, document, design, process, device, material, or other item that is subject to a copyright, trademark, patent, or other property or privacy right, then the Contractor must obtain all necessary licenses, authorizations, permissions, and approvals related to its use and obtain all necessary licenses, authorizations, permissions, and approvals to permit the County to use such item(s) pursuant to the County's rights granted under the contract.
- 19.3. The Contractor agrees that any and all Deliverable(s) are the sole property of the County and must be available to the County at any time. The County has the right to use the same without restriction and without compensation to the Contractor other than that specifically provided by this contract. Deliverables do not include Pre-Existing Intellectual Property.
- 19.4. For all Contractor Pre-Existing Intellectual Property embedded in any Deliverable(s), Contractor grants to the County a license to use such Pre-Existing Intellectual Property in connection with the County's permitted use of the Deliverable(s).

20. LIMITATION OF COUNTY'S LIABILITY.

- 20.1. Any obligation or liability of the County arising in any way from this contract is subject to, limited by, and contingent upon the appropriation and availability of funds, as well as the damage caps and notice requirements stated in the Local Government Tort Claims Act, Md. Code Ann., Cts. & Jud. Proc., §§5-301, et seq. (the "LGTC"), the immunities and prohibited actions with respect to the County and its personnel set forth in Md. Code Ann., Cts. & Jud. Proc., §§5-501, et. seq., and the provisions governing contract claims against the County set forth in Md. Code Ann., Cts. & Jud. Proc. §5-5a-02, (together the "Applicable County

Liability Statutes”), all as amended from time to time. Any indemnification given by the County in this contract is not intended to create any rights or causes of action in any third parties or to increase the County’s liability above the caps provided in the Applicable County Liability Statutes, as applicable.

21. NON-INFRINGEMENT AND INDEMNIFICATION.

- 21.1. The Contractor warrants that the Deliverables provided to the County do not and will not infringe upon or violate any patent, copyright, trade secret or other proprietary rights of any third party.
- 21.2. To the extent any Deliverable(s) incorporates any third party’s intellectual property, Contractor warrants that Contractor has the right to use such third-party intellectual property in connection with provision of the Deliverable and that it has obtained, to the extent necessary, permission for the County to use the third-party intellectual property in connection with the County’s permitted use of the Deliverable(s).
- 21.3. The Contractor must protect, indemnify, and hold harmless the County, and its agents and employees, from and against any and all claims, suits, actions, liabilities, damages, losses, demands, and judgments (including, without limitation, litigation costs, lost employee time, and counsel fees) arising out of or in connection with any third party claim based upon or arising out of any allegation of infringement, misappropriation, violation, unauthorized use, or conversion of any patent, copyright, trademark or trade name, license, proprietary right, or other related property or privacy interest in connection with, or as a result of, the Contractor-provided products/services this contract and/or the performance by the Contractor of any of its activities or obligations under this contract.
- 21.4. If any equipment, software, services (including methods) products or other intellectual property used or furnished by the Contractor is, or in the Contractor’s reasonable judgment is likely to be, held to constitute an infringing product, the Contractor must, at its expense and option, either:
 - 21.4.1. Procure the right for the County to continue using the Product(s);
 - 21.4.2. Replace the product with a non-infringing equivalent that satisfies all the requirements of the contract; or
 - 21.4.3. Modify the Product(s) to make it or them non-infringing, provided that the modification does not materially alter the functionality or efficacy of the product or cause the Product(s) or any part of the work to fail to conform to the requirements of the contract, or only alters the Product(s) to a degree that the County agrees to and accepts in writing.
- 21.5. The Contractor must report to the County, promptly and in written detail, each notice or claim of copyright infringement received by the Contractor with respect to any product, service, or data delivered under this contract.

22. PAYMENT AUTHORITY.

- 22.1. No payment by the County may be made, or is due, under this contract, unless funds for the payment have been appropriated and encumbered by the County. Under no circumstances will the County pay the Contractor for legal fees, late fees, or shipping fees that are not provided for in the contract. The Contractor must not perform any work (provide goods, services, or construction) prior to receiving written confirmation that the County has appropriated and encumbered funds for that work. If the Contractor fails to obtain this

verification from the Office of Procurement prior to performing work, the County has no obligation to pay the Contractor for the work.

- 22.2. If this contract provides for an additional contract term beyond its initial term, continuation of Contractor's performance under this contract beyond the initial term is contingent upon, and subject to, the appropriation of funds and encumbrance of those appropriated funds for payments under this contract. If funds are not appropriated and encumbered to support continued Contractor performance in a subsequent fiscal period, Contractor's performance must end without further notice from, or cost to, the County. The Contractor acknowledges that the County Executive has no obligation to recommend, and the County Council has no obligation to appropriate, funds for this contract in subsequent fiscal years. Furthermore, the County has no obligation to encumber funds to this contract in subsequent fiscal years, even if appropriated funds may be available. Accordingly, for each subsequent contract term, the Contractor must not undertake any performance under this Contract until the Contractor receives a purchase order or contract amendment from the County that authorizes the Contractor to perform work for the next contract term.

23. P-CARD OR SUA PAYMENT METHODS.

- 23.1. The County is expressly permitted to pay the vendor for any or all goods, services, or construction under the contract through either a procurement card ("p-card") or a Single Use Account ("SUA") method of payment, if the Contractor accepts the noted payment method from any other person. In that event, the County reserves the right to pay any or all amounts due under the contract by using either a p-card (except when a purchase order is required) or a SUA method of payment, and the Contractor must accept the County's p-card or a SUA method of payment, as applicable. Contractor is prohibited from charging or requiring the County to pay any fee, charge, price, or other obligation for any reason related to or associated with the County's use of either a p-card or a SUA method of payment.

24. PERSONAL PROPERTY.

- 24.1. All furniture, office equipment, equipment, vehicles, and other similar types of personal property specified in the contract, and purchased with funds provided under the contract, become the property of the County upon the end of the contract term, or upon termination or expiration of this contract, unless expressly stated otherwise.

25. PRIVACY AND INFORMATION SECURITY.

- 25.1. Encryption of Data at Rest. The Contractor must ensure hard drive encryption consistent with validated cryptography standards as referenced in FIPS 140-2, Security Requirements for Cryptographic Modules for all Personal Information, unless the Contractor presents a justifiable position approved by the County that Personal Information must be stored on a portable device in order to accomplish work as defined in the contract.
- 25.2. Health Insurance Portability and Accountability Act (HIPAA). Contractor must comply with all requirements in the federal Health Insurance Portability and Accountability Act (HIPAA), to the extent that HIPAA is applicable to this contract. Furthermore, Contractor must enter into the County's standard Business Associate Agreement or Qualified Service Organization Agreement when Contractor or the County, as part of this contract, may use or disclose to one another, to the individual whose health information is at issue, or to a third-party, any Protected Health Information that is obtained from, provided to, made available to, or created by, or for, the Contractor or the County.
- 25.3. Maryland Protection of Information by Government Agencies ("PIGA"). In any contract under which Contractor is to perform services and the County may disclose to Contractor Personal

Information about an individual, as defined by State law, Contractor must implement and maintain reasonable security procedures and practices that: (a) are appropriate to the nature of the Personal Information disclosed to the Contractor; and (b) are reasonably designed to help protect the Personal Information from unauthorized access, use, modification, disclosure, or destruction. Contractor's requirement to implement and maintain reasonable security practices and procedures must include requiring any third-party to whom it discloses Personal Information that was originally disclosed to Contractor by the County to also implement and maintain reasonable security practices and procedures related to protecting the Personal Information. Contractor must notify the County of a breach of the security of a system if the unauthorized acquisition of an individual's Personal Information has occurred or is reasonably likely to occur and also must share with the County all information related to the breach. Contractor must provide the above notification to the County as soon as reasonably practicable after Contractor discovers or is notified of the breach of the security of a system. Md. Code Ann., State Gov't. § 10-1301, et seq.

- 25.4. No Sale or Redisclosure. Any data provided by the County to the Contractor under this contract that constitutes personal records or sensitive data, both as defined by Md. Code Ann., State Gov't § 10-1702, or geolocation data must not be sold or redisclosed by the Contractor. Contractor must bind its subcontractors to these no-sale and no-redisclosure requirements.
- 25.5. Payment Card Industry Compliance. In any contract where the Contractor provides a system or service that involves processing credit card payments ("Payment Solution"), the Contractor must ensure that the Payment Solution is compliant with the Payment Card Industry Data Security Standard ("PCIDSS"), as determined and verified by the County's Department of Finance. The Payment Solution must process credit card payments using a Merchant ID ("MID") obtained by the County's Department of Finance and held in the County's name as the merchant of record unless the Department of Finance determines, in its sole discretion, that use of a County MID is not feasible for the specific Payment Solution. Use of an MID obtained and held by the Contractor in the Contractor's name as merchant of record is prohibited unless the Contractor obtains prior written approval from the County's Department of Finance. Approval may be granted only as a last resort measure when the Department of Finance determines that no technically or operationally feasible County-issued MID configuration is available. Any such approval will be limited, conditional, and subject to additional security, reporting, and monitoring requirements as established by the Department of Finance. The Contractor must comply with all requirements set forth in the County's PCI Security Addendum and Vendor Security Addendum.
- 25.6. Protection of County Data. Contractor must safeguard the confidentiality, integrity and availability of County Data and comply with the following conditions:
- 25.6.1. Contractor must implement and maintain appropriate administrative, technical and organizational security measures to safeguard against unauthorized access, disclosure or theft of personal data and non-public data. Such security measures must be in accordance with recognized industry practice and not less stringent than the measures the Contractor applies to its own personal data and non-public data of similar kind.
- 25.6.2. Contractor must ensure that all County Data is backed up and is recoverable by the Contractor.

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- 25.6.3. All personal data must be encrypted at rest and in transit with controlled access. Unless otherwise stipulated, the Contractor is responsible for encryption of the personal data.
- 25.6.4. County Data must not be copied, disclosed or retained by the Contractor for subsequent use in any transaction that does not include the County.
- 25.6.5. All County Data must be stored solely in data centers located in the United States. Contractor must not allow its employees, agents or subcontractors to store County data on portable devices, including personal computers, except for devices that are used and kept only at its data centers located in the United States. The Contractor must not permit its personnel and contractors to access County Data remotely except as may be required to provide technical support.
- 25.6.6. Prohibition on Use of County Data for AI Training:
- 25.6.7. Contractor must not use, and must not permit any third party to use, any County Data for the purposes of training, fine-tuning, or otherwise improving any artificial intelligence (AI), machine learning (ML), or similar models, including large language models, neural networks, or any data processing tools that derive insights or functionality through algorithmic training, unless specifically defined in the contract.
- 25.6.8. No Derivative Works from County Data:
- 25.6.9. Contractor must not create, or assist in the creation of, any derivative works or data sets based on County Data for the purpose of developing or enhancing any AI models or algorithms.
- 25.6.10. Data Segregation:
- 25.6.11. Contractor must implement appropriate technical and organizational measures to ensure that County Data is segregated from any data sets used for AI training.
- 25.6.12. Prior consent to AI Features:
- 25.6.13. Contractor must not introduce or make AI features available without explicit County approval. County must retain decision-making authority over the use of AI, even when Contractor introduces new features after the contract is signed.

26. RIGHT TO REMOVE INDIVIDUALS.

- 26.1. The County has the right at any time to require that the Contractor remove from involvement with the contract any Contractor employee, agent or representative who the County believes is detrimental to its working relationship with the Contractor or to the provision of services to the public.

27. SECURITY INCIDENT OR DATA BREACH NOTIFICATION AND LIABILITY.

- 27.1. The Contractor must report a Security Incident to the County within twenty-four (24) hours.
- 27.2. The Contractor must take all commercially reasonable measures to fully investigate a Security Incident and to confirm whether a Data Breach has occurred.
- 27.3. In the event the Contractor learns of, or reasonably believes that there has been, a Data Breach, the Contractor must:
 - 27.3.1. Notify the County's contract administrator no later than three (3) business days by telephone and email. Contractor's report must include, to the extent known:

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- 27.3.1.1. The nature of the unauthorized use or disclosure;
- 27.3.1.2. Identification of the data used or disclosed;
- 27.3.1.3. Identification of any individual(s) whose personal information or PHI was used or disclosed;
- 27.3.1.4. Identification of the individual(s) or group(s) who made the unauthorized use and/or received the unauthorized disclosure;
- 27.3.1.5. What action Contractor has taken and/or plans to take to mitigate any damages arising out of the breach.
- 27.3.1.6. Any other such information as reasonably requested by the County.
- 27.3.2. Take all commercially reasonable measures to fully to investigate and resolve the Data Breach;
- 27.3.3. Cooperate with the County and provide the County with any information needed by the County to comply with its legal obligations pursuant to the PIGA, HIPAA, and any other applicable laws. Such information may include, but is not necessarily limited to, the names and contact information of all persons whose personal information was acquired and/or was possessed by the Contractor as part of its performance under the contract;
- 27.3.4. Keep the County apprised of the status of Contractor's investigation insofar as it pertains to County Data and/or the contract, including, but not limited to, advising the County when any element of the Contractor's initial report, set forth in Paragraph 28.3 above, that was unknown becomes known;
- 27.3.5. Promptly implement appropriate remedial measures, if necessary; and;
- 27.3.6. Document responsive actions taken related to the Data Breach, including any post-incident review of events and actions taken to make changes in business practices in providing the services, if necessary.
- 27.4. If a Data Breach is a direct result of the Contractor's breach of its contractual obligations to encrypt personal data or otherwise prevent its release, the Contractor must bear the costs associated with (1) the investigation and resolution of the Data Breach; (2) notifications to individuals, regulators or others required by state law; (3) a credit monitoring service required by state (or federal) law; (4) a website or a toll-free number and call center for affected individuals required by state law — all not to exceed the average per record per person cost calculated for data breaches in the United States in the most recent Cost of Data Breach Study: Global Analysis published by the Ponemon Institute at the time of the data breach; and (5) complete all corrective actions as reasonably determined by service provider based on root cause; all [(1) through (5)] subject to this contract's limitation of liability.

28. TERMINATION FOR CONVENIENCE.

- 28.1. This contract may be terminated by the County, in whole or in part, upon written notice to the Contractor, when the County determines this to be in its best interest. The termination for convenience is effective on the date specified in the County's written notice. Payment for goods and/or services provided pursuant to the contract and accepted by the County prior to the date of termination, will be compensated in accordance with the contract.
- 28.2. If the contract is terminated for convenience, the Contractor may seek reimbursement for actual, reasonable expenses incurred by the Contractor, prior to the date of notification of

termination, specifically in connection with the Contractor's good faith efforts to perform, or prepare to perform, the subject contract. The Contractor is not entitled to reimbursement of costs for items that may be repurposed or returned by the Contractor. The Contractor is not entitled to recovery of anticipated profit, ordinary costs of doing business, or shared costs (i.e., a percentage of contractor's general operating costs). The Contractor must not be paid compensation as a result of a termination for convenience that exceeds the amount encumbered to pay for work to be performed under the contract.

29. TERMINATION FOR DEFAULT.

- 29.1. The Director, Office of Procurement, may terminate the contract in whole or in part, whenever the Director, Office of Procurement, determines that the Contractor is:
 - 29.1.1. defaulting in performance or is not complying with any provision of this contract;
 - 29.1.2. failing to make satisfactory progress in the prosecution of the contract; or
 - 29.1.3. endangering the performance of this contract.
- 29.2. The Director, Office of Procurement, will provide the Contractor with a written notice to cure the default. The termination for default is effective on the date specified in the County's written notice. However, if the County determines that default contributes to the curtailment of an essential service or poses an immediate threat to life, health, or property, the County may terminate the Contract immediately upon issuing oral or written notice to the Contractor without any prior notice or opportunity to cure.
- 29.3. In addition to any other remedies provided by law or the contract, the Contractor must compensate the County for additional costs incurred by the County to obtain substitute performance. A termination for default is a termination for convenience if the termination for default is later found to be without justification.

30. TIME.

- 30.1. Time is of the essence.

31. TRANSITION FOLLOWING TERMINATION.

- 31.1. Upon termination or the expiration of the contract, the Contractor must, upon request by the County:
 - 31.1.1. Return to the County all County Data in a mutually agreed-upon format; and
 - 31.1.2. Preserve, maintain, and protect all County Data for a period of up to ninety (90) days after the termination or expiration date, so that the County can ensure that all returned data is readable.
- 31.2. Following the ninety (90) day retention period, or earlier if directed by the County, Contractor must, unless legally prohibited from doing so, securely dispose of all County Data in Contractor's possession in all of its forms.
- 31.3. County Data must be permanently deleted and must not be recoverable, according to NIST guidelines for media sanitization (NIST SP 800-88); and certificates of destruction must be provided to the County.
- 31.4. Upon request by the County, Contractor must perform preparatory and/or close-out work to assist the County in transitioning services to a new vendor to ensure continuity of services.

32. WORK UNDER THE CONTRACT.

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Contractor must not commence work under this contract until all conditions for commencement are met, including execution of the contract by both parties, compliance with insurance requirements, encumbrance of funds, and issuance of any required notice to proceed.

THIS FORM MUST NOT BE MODIFIED WITHOUT THE PRIOR APPROVAL OF THE OFFICE OF THE COUNTY ATTORNEY.

ATTACHMENT B. ACKNOWLEDGEMENT PAGE

The offeror must include a signed acknowledgment that all the provisions, terms and conditions of this solicitation are agreeable to the offeror and may, at the County's option, be made applicable in any contract issued as a result of this solicitation. Offers that do not include such an acknowledgment may be rejected. Executing and returning (with the offer) the acknowledgment shown below will satisfy this requirement.

The undersigned agrees that all the provisions, terms and conditions of this solicitation may, at the County's option, be made applicable in any contract issued as a result of this solicitation.

Business Firm's Legal Name (printed)	
Business Firm Legal Address	
Printed Name, Title of Person Authorized to Sign Proposal	
E-Mail of Person Authorized to Sign Proposal	
Signature	
Date	

Name and Signature Requirements for Proposals and Contracts

The correct and full legal business name of the offeror must be used in proposals received and on all contracts issued as a result of this solicitation. A trade name (i.e., a shortened or different name under which the firm does business) must not be used when the legal name is different. Corporations must have names that comply with State law, which requires a suffix indicating the corporate status of the business (e.g. Inc., Incorporated, etc.). Trade names may be indicated by individuals or corporations with the individual or corporate name followed by "t/a" (trading as) or "d/b/a" (doing business as), respectively.

All signatures must be made by an authorized officer, partner, manager, member, or employee. The signing of this offer or a contract is a representation by the person signing that the person signing is authorized to do so on behalf of the offeror or contractor. The Firm's legal name listed above must coincide with the County's Vendor Registration System (CVRS) and the Firm's W-9.

Acknowledgment of Solicitation Amendments

The Offeror acknowledges receipt of the following amendment(s) to the solicitation:

Amendment Number(s)	Date

ATTACHMENT C. REFERENCES

You are requested to provide at least three (3) references to the County with your proposal. The references must be from individuals or firms for whom work of a similar scope has been performed within the last three years. Names for references shall be individuals who directly supervised or had direct knowledge of the services or goods provided.

Reference #1

Item	Please fill in the information
Name of the Company	
Address (street, city, state, zip)	
Contact Person Name	
Contact Person Email	
Contact Person Cell Phone	
Contact Person Office Phone	

Reference #2

Item	Please fill in the information
Name of the Company	
Address (street, city, state, zip)	
Contact Person Name	
Contact Person Email	
Contact Person Cell Phone	
Contact Person Office Phone	

Reference #3

Item	Please fill in the information
Name of the Company	
Address (street, city, state, zip)	
Contact Person Name	
Contact Person Email	
Contact Person Cell Phone	
Contact Person Office Phone	

ATTACHMENT D. COST PROPOSAL/PRICING SHEET

FEE SCHEDULE

For the requirements included in this Informal Mini including services as described in the SCOPE OF SERVICES (Section 2); the hourly rate must include any and all costs for the performance of work outlined herein, and be fully burdened including overhead, profit, insurance, etc.

COUNTY COUNCIL STAFF ASSISTANT SERVICES

\$_____per hour

ATTACHMENT E. MANDATORY INSURANCE REQUIREMENTS

MANDATORY MINIMUM INSURANCE REQUIREMENTS – Provide contracted administrative services for Council Member

Prior to the execution of the contract by the County, the proposed awardee/contractor must obtain, at their own cost and expense, the following *minimum* (not maximum) insurance coverage with an insurance company/companies licensed to conduct business in the State of Maryland and acceptable to the Division of Risk Management. This insurance must be kept in full force and effect during the term of this contract, including all extensions. The insurance must be evidenced by a certificate of insurance, and if requested by the County, the proposed awardee/contractor shall provide a copy of the insurance policies and additional insured endorsements. The minimum limits of coverage listed below shall not be construed as the maximum as required by contract or as a limitation of any potential liability on the part of the proposed awardee/contractor to the County nor shall failure to request evidence of this insurance in any way be construed as a waiver of proposed awardee / contractor's obligation to provide the insurance coverage specified. The Contractor's insurance shall be primary with the County's being non-contributory.

Workers' Compensation/Employer's Liability – can be waived if Contractor is not an employer
Meeting all statutory requirements of the State of Maryland Law and with the following minimum Employer's Liability limits:

Bodily Injury by Accident - \$100,000 each accident

Bodily Injury by Disease - \$500,000 policy limits

Bodily Injury by Disease - \$100,000 each employee

Subcontractor Requirements

Unless otherwise stated below the proposed awardee/contractor shall require all subcontractors to obtain, and maintain, insurance with limits equal to, or greater, than those limits required within the contract.

Policy Cancellation

Should any of the above policies be cancelled before the expiration date thereof, written notice must be delivered to the County in accordance with the policy provisions.

Certificate Holder

Montgomery County, Maryland
Office of the County Council / Stephen Mathany
100 Maryland Ave., 4th Floor
Rockville, MD 20850

ATTACHMENT F. WEB-LINKS FOR DOCUMENTS AND FORMS

Click the following link to access all forms listed below: <https://www.montgomerycountymd.gov/office-procurement/solicitations-contracts/solicitation-forms>.

- County Vendor Registration System.
- Minority, Female, Disabled Person Subcontractor Performance Plan.
- Sample MFD Report of Payments Received.
- Wage Requirements Certification Form and 501(c)(3) Nonprofit Organization's Employee's Wage and Health Insurance Form.

END OF DOCUMENT