SECTION 1. INTENT

1.1. Background

1.1.1. The Montgomery County, Maryland ("County") Home Sharing Program ("Program") has been identified as one of the priorities for the Age-Friendly Montgomery Housing Workgroup to help County residents remain in their homes longer. The County's Department of Health and Human Services ("DHHS") intends to implement this Program to match County homeowners ("HO") with home-seekers ("HS") to facilitate long-term rental agreements.

1.2. RFP Goals

1.2.1. DHHS is seeking an experienced, and capable entity to provide the Program utilizing volunteers and/or paid staff ("Staff"). The Program facilitates stable matches of HO with HS on an equitable and nonsectarian basis that develop into long-term relationships and rental agreements to enhance older adults' ability to age at home.

1.2.2. The County intends to award one (1) contract under this Request for Proposals (RFP). The total estimated annual compensation for the contract resulting from this solicitation is $209,000.00. The County makes no guarantee of a specific compensation amount. All compensation payable under any contract resulting from this solicitation is subject to, and contingent upon, the State and County's appropriation and encumbrance of funding for this Program described in this solicitation.

1.2.3. In the event the County receives additional funding for services requested under this solicitation, the County reserves the right to expand the existing scope of services for the resulting contract. Such additional services are not guaranteed and will only be requested if funds for additional services are appropriated and encumbered by the County. These expanded services may be added during negotiations or added via an amendment to the Contract.

SECTION 2. SCOPE OF WORK

2.1. General Requirements

2.1.1. The Contractor must provide the necessary personnel, and materials, to facilitate rental agreements between HO and HS in an equitable and nonsectarian basis within the County.

2.1.2. The Contractor must comply the U.S. Department of Health and Human Services Office of Minority Health National Standards for Culturally and Linguistically Appropriate Services (CLAS), which can be found at https://www.montgomerycountymd.gov/department-health-human-services/about-us/doing-business-dhhs

2.1.3. The Contractor must comply with all federal, State and local laws and regulations governing privacy and the protection of health information, including but not limited to, the Health Insurance Portability and Accountability Act. The Contractor must also sign a Business Associate Agreement with the County prior to execution of the contract resulting from this Solicitation

2.1.4. The Contractor must comply with DHHS' Background Clearance Policy requirements for Staff as stated in the link listed below. At a minimum, any and all staff and volunteers having unsupervised contact with a vulnerable population, including children and/or the elderly, must be appropriately screened prior to providing services under this Contract. The Contractor must check the link for updates to the policy. The Background Check

Policy is located here: https://www.montgomerycountymd.gov/department-health-human-services/about-us/doing-business-dhhs

2.1.5. All Staff who are found to have a verified history of physical abuse, neglect, financial exploitation, or sexual abuse must not provide services under the resulting contract.

2.2. Service Requirements

2.2.1. The Contractor must:

2.2.1.1. Develop, implement, and maintain written Program policies and procedures, subject to County approval, within ninety (90) days of the effective date of the contract resulting from this RFP.

2.2.1.2. Train all Staff before any services is provided to HO and HS.

2.2.1.3. Raise public awareness of the Program to ensure HO and HS have the largest variety of match options. The Contractor must provide a marketing implementation plan and submit updates with the quarterly report to the Contract Monitor. The Contractor must acknowledge in all publicity that the County is funding this Program.

2.2.1.4. Maintain a phone line and a website for the Program and respond to inquires within 1-2 business days.

2.2.1.5. Respond to all HO and HS callers and offer intake when appropriate.

2.2.1.6. Provide technical assistance to HO and HS to support the rental process, including providing rental agreement templates, information on their rights, obligations, and ways to address disputes.

2.2.1.7. Provide referrals to HO and HS with other needs for any services deemed necessary by the Contractor and refer HO and HS to other County resources.

2.2.1.8. Facilitate successful rental agreements for 20 unduplicated HO with HS at a minimum, per contract term.

2.2.1.9. Provide guidance to HO and HS on landlord-tenant resources including, but not limited to, the Department of Health and Community Affairs checklist and room rental guidelines (See https://www.montgomerycountymd.gov/department-housing-community-affairs/information-renters/office-landlord-tenant-affairs/landlord-tenant-affairs-handbook), to determine whether an HO is offering an acceptable space according to the guidelines.

2.2.1.10. Provide administrative support to ensure the Program success.

2.2.1.11. Establish a mechanism and quality assurance procedure for collecting data on matches. This includes maintaining a waitlist for whom the Contractor has not found suitable matches.

2.2.1.12. Submit the required monthly, quarterly, and annual reports, as outlined in this RFP.

2.2.1.13. Develop assessment tool(s) to be used at various stages of service (initial, interim, and final), service agreements, and service plans. Templates must be shared with the County for approval. In addition, copies of signed service agreements and service plans must be shared with the County upon request.

2.2.1.14. The Contractor must systematically monitor matches between HO and HS as follows:

2.2.1.14.1. The Contractor must personally contact all matched participants after the rental agreement has been activated between the HO and the HS to determine each participant's

level of satisfaction with his/her match. Monthly check-ins must continue for a minimum of 6 months (or longer if needed).

2.2.1.14.2. If the HO or HS is experiencing challenges, the Contractor must offer resources (Housing counseling, financial counseling, or other relevant resources) to assist in resolving the challenge.

2.2.1.15. The Contractor must attempt to serve all County residents who wish to participate in the Program.

2.2.1.15.1. HO must be County residents.

2.2.1.15.2. HS may be County residents or residents of other jurisdictions who wish to move into the County.

2.2.1.16. The Contractor must have a County-approved implementation plan on the start date of the contract resulting from this RFP to ensure continuation of services for HO and HS who are currently enrolled in the County's Program. Services must continue within fifteen (15) days of the execution of the contract resulting from this RFP to ensure there is no interruption to direct services.

2.2.2. Upon the expiration or termination of the Contract, or upon County's request, the Contractor must provide conversion and all services necessary for an orderly transition of this, in whole or in part, to another contractor, including, without limitation, the transfer of all participants' records, financial records pertaining to the Program specified in this solicitation, and other data in the possession, custody or control of the Contractor. The County shall facilitate a smooth transition between the outgoing contractor for this Program and the incoming contractor.

2.2.3. The Contractor must implement and maintain reasonable security practices and procedures to include requiring any third party to whom it discloses personal information originally disclosed to Contractor by the County to also implement and maintain reasonable security practices and procedures related to protecting the personal information disclosed.

2.3. Performance Metrics and Contract Management

2.3.1. *Surveys* - The Contractor must survey all HO and HS involved with the Program at least once per contract term (matched or not). The Contractor must:

2.3.1.1. Share a draft of the survey tool with the County for approval.

2.3.1.2. Share a survey distribution plan with the County that specifies the timing of the survey, the percentage and or number of HO and HS to be surveyed, and the methods of distribution (e.g., survey link, QR Code, phone, and /or distributing paper copies).

2.3.1.3. Distribute the survey and reminders to complete the survey.

2.3.1.4. Maintain the integrity of the data collection process by ensuring individuals complete the survey independently and without undue influence. The Contractor shall not assist or coach participants in ways that could bias or compromise the validity of their responses.

2.3.1.5. Share individual-level survey response data with the County upon completion of data collection.

2.3.1.6. Analyze survey results and share results in an accessible and digestible format.

2.3.2. Performance Measures

2.3.2.1. Performance will be assessed using measures from the survey and the monthly data report submitted by the Contractor as outlined in Section 2.7 Reports and Deliverables. Measures may be changed to reflect evolving Program goals, regulatory requirements, or data needs. Any changes will be agreed upon in advance between the County and the Contractor.

Required Measure	**Type of Measure**	**Source**	**Calculation**
Number of matches	Performance	Monthly data	Number of matches in the reporting period
Percent of matches that are successful	Outcome	Monthly data	Percent of matches that endure 6 or more months (out of number of matches started at least 6 months before the end of the reporting period)
Percent of HO and HS who felt respected	Performance (experience)	Survey	% of all surveyed HO and HS who agreed or strongly agreed: “I was treated with respect by Program Staff.”
Percent of HO and HS who received timely services	Performance (experience)	Survey	% of all surveyed HO and HS who agreed or strongly agreed: “I was served by the Program in a timely manner.”
Percent of matched HO and HS who felt less stress out about money	Outcome	Survey	% of surveyed HO and HS in a match who agreed or strongly agreed: “I feel less stress about money since I started getting help from the Program.”
Percent of matched Ho and HS who were better able to pay bills	Outcome	Survey	% of surveyed HO and HS in a match who agreed or strongly agreed: “I have fewer unpaid or late bills since I started getting help from the Program.”
Percent of matched HO and HS who had more social interaction	Outcome	Survey	% of surveyed HO and HS in a match who agreed or strongly agreed: “I have more meaningful social interactions.”

Percent of HO and HS who were satisfied	Performance (satisfaction)	Survey	% of surveyed Ho and HS who agreed or strongly agreed: "Overall, I am satisfied with the Program." Survey should also ask match HO about satisfaction with components of the Program: "I am satisfied with the matching process." "I am satisfied with the support to handle challenges and disputes after the rental agreement was signed, if applicable." "I am satisfied with referrals to other community resources for housing needs."

2.4. Contractor Qualifications

2.4.1. **Contractor Mandatory Qualifications**

2.4.1.1. The Contractor must be registered to do business in the State of Maryland and maintain a "good standing" status and have the ability to perform all services as stipulated in this RFP.

2.4.1.2. The Contractor must have, at a minimum, 3 years of experience providing services similar to the Program under the scope of work. Services provided must include housing consulting between landlords and renters.

2.4.1.3. The Contractor must have at a minimum 3 years of experience providing services to older adults with disabilities and community outreach events

2.5. Contractor's Responsibilities

2.5.1. The Contractor is responsible for all work as outlined in this RFP.

2.6. County's Responsibilities

2.6.1. The County will be responsible for processing monthly invoices, sharing data collection, and monitoring the performance of the Contractor.

2.7. Reports and Deliverables

2.7.1. The Contractor must provide the following reports to the County:

2.7.1.1. Monthly Report - due no later than fifteen (15) days following the end of each month, in a format approved by the County, describing the services provided by the Contractor in the reporting month. The Contractor must submit monthly

data and survey responses in a format that can be readily analyzed by the County, such as Microsoft Excel (.xlsx) or CSV (.csv) files. Image-based data files will not be accepted. The County will provide the Contractor with instructions on how to securely share data files. The monthly report must be submitted with the monthly invoice. The report must include the following, at a minimum:

Inquiries:
- Name
- Age
- Zip code
- HO/HS designation
- Referral Source (County staff, nonprofit/provider, or self-inquiry)
- Date of initial inquiry
- Date of consultation
- Inquiry to complete a profile
- Inquiry only

Visits (In-person or virtual):
- HO Name
- HS Name (if applicable)
- Location of Visit (In-Person/Virtual)
- Purpose of the visit (e.g., access space/take photos for profile, introduce prospective HS)

Matches:
- HO City and Zip code
- HO Name
- HS Name
- Match Status (in progress, ongoing, failed, terminated)
- Date of rental agreement started (if applicable)
- Reason for match failure or termination

2.7.1.1.1. Monthly reports must include row-level datasets with one record per inquiry, visit, and match. The monthly report must include data on all new inquiries, visits, and matches, as well as updates to previously reported inquiries or matches (e.g., profile completion, match termination).

2.7.1.1.2. Monthly reports must also include the number of outreach events and activities by type (e.g., virtual presentations, in-person events, community outreach, social media advertisements), including the location for in-person events.

2.7.2. Quarterly Narrative Report - due no later than fifteen (15) days following the end of each quarter, in a format approved by the County, delineating Program activities, statistics, and trends. The narrative report must include descriptions of the following activities including, but not limited to:

2.7.2.1. Publicity and outreach efforts

2.7.2.2. Status of matches

2.7.2.3. Outstanding challenges – aggregate demographic information on participants served, including gender, race, ethnicity, zip code, age, income range, county residency, need for accessible housing

2.7.3. Annual Report – due no later than 30 days after the end of the contract term. The report must include the following, at a minimum:

2.7.3.1. Year-to-date data aggregated from monthly reports

2.7.3.2. Analysis of success and challenges of the matching process

2.7.3.3. Plans for improvement of the Program

SECTION 3. SUBMISSION INSTRUCTIONS

3.1. Proposal Submissions

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

3.1.2. Offerors must electronically submit their proposal through BidNet Direct in the format detailed below. Proposals will be evaluated only on material that is submitted. The offeror must submit sufficient information to enable the Qualification Selection Committee (QSC) to evaluate the offeror's capabilities and experience.

The Offeror is responsible for ensuring that the materials uploaded to BidNet Direct are properly formatted and not corrupted. Offerors should carefully check their submissions on BidNet Direct following upload to confirm that all documents were properly uploaded and legible. Offerors will not be allowed to submit or supplement any missing, corrupted, or illegible documents after the solicitation has closed.

Proposals must include the following information (including labeled sections numbered as shown):

3.1.2.1. A **cover letter** with a brief description of the firm, including the offeror's name, address, telephone number, and email address.

3.1.2.2. The completed **Acknowledgment Page** of this solicitation, signed by a person authorized to bind the offeror to the proposal (see Attachment B).

3.1.2.3. At least three **References** that may be contacted to attest to the quality and timeliness of the offeror's work of similar nature and scope as that required by the County in this solicitation (see Attachment C).

3.1.2.4. If this solicitation is subject to the **Wage Requirements Law** (see Notice of Solicitation), the offeror must submit the appropriate Wage Requirements Law Certification forms. Failure to submit and complete the required material information on the form(s) may cause the offeror's proposal to be unacceptable under County law, and the proposal may be rejected.

3.1.2.5. The Minority, Female, Disabled Persons Subcontractor Performance Plan.

To ensure a contract can move forward as a result of this solicitation, this plan must be submitted with the offeror's proposal.

Note: Offerors who are seeking additional MFD participation evaluation scoring points (See Section 4), as well as MFD Criteria Evaluation Points for RFPs) MUST complete and submit this form with its proposal submission.

*The Purchasing Category Related to the MFD Participation Evaluation Factor for this solicitation is indicated on the Notice of Solicitation.

3.1.2.6. The Minority Business Program and Offeror's Representation (see Sample of MFD Report of Payments Received)