



Anne Arundel County Mental Health Agency

Multi-Step Invitation for Bids (MS-IFB)

Issue Date: September 1, 2021

Assisted Living Facility – Behavioral Health Services

**Anne Arundel County Mental Health Agency
IFB Key Information Summary Sheet**

Invitation for Bids: Assisted Living Facility – Behavioral Health Services

IFB Issue Date: September 1, 2021

Procurement Officer: Chelsea Bednarczyk, Chief Operating Officer
1 Truman Parkway, Suite 101
Annapolis, Maryland 21401
Phone: (410) 222-7858 Fax: (410) 222-7881
e-mail: cbednarczyk@aamentalhealth.org

Bids are to be sent to: 1 Truman Parkway, Suite 101
Annapolis, Maryland 21401
Attention: Chelsea Bednarczyk

Pre-Bid Conference: Monday, September 20, 2021 at 1:00 pm Local Time
Via Zoom

Bid Due (Closing) Date and Time: Friday, October 15, 2021 by 3:00 pm Local Time

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SECTION 1 - GENERAL INFORMATION

1.1 Summary Statement

- 1.1.1 The Anne Arundel County Mental Health Agency, Inc. (AACMHA or the Agency) is issuing this Multi-Step Invitation for Bids (IFB) to provide an Assisted Living Facility Behavioral Health Services (ALF – BHS) program in Anne Arundel County or the surrounding counties that can provide services for 4 to 6 older adults with serious mental illness in single occupancy rooms.
- 1.1.2 It is the Agency’s intention to obtain services, as specified in this IFB, from a Contract between the selected Bidder and the Agency. The anticipated duration of services to be provided under this Contract is the remainder of fiscal year 2022 (end date June 30, 2022) with an annual option to renew. See Section 1.4 for more information.
- 1.1.3 The Agency intends to make a single award as a result of this IFB. See IFB Section 1.12 for more information.
- 1.1.4 A Bidder, either directly or through its subcontractor(s), must be able to provide all services and meet all of the requirements requested in this solicitation and the successful Bidder (the Contractor) shall remain responsible for Contract performance regardless of subcontractor participation in the work.

1.2 Abbreviations and Definitions

For purposes of this IFB, the following abbreviations or terms have the meanings indicated below:

- 1. **Bid** – A Statement of price offered by a Bidder in response to an IFB.
- 2. **Bidder** – An entity that submits a Bid in response to this IFB.
- 3. **Business Day(s)** – The official working days of the week to include Monday through Friday. Official working days exclude Agency Holidays (see definition of “Normal Agency Business Hours” below).
- 4. **Contract** – The Contract awarded to the successful Bidder pursuant to this IFB.
- 5. **Contract Commencement** - The date the Contract is signed by the Agency following any required approvals of the Contract, including approval by the Board of Directors, if such approval is required. See Section 1.4.
- 6. **Contract Monitor (CM)** – The Agency representative for this Contract who is primarily responsible for Contract administration functions, including issuing written direction, invoice approval, monitoring this Contract to ensure compliance with the terms and conditions of the Contract, monitoring MBE and VSBE compliance, and achieving completion of the Contract on budget, on time, and within scope. The Contract Monitor may authorize in writing one or more Agency representatives to act on behalf of the Contract Monitor in the performance of the Contract Monitor’s responsibilities.
- 7. **Contractor** – The selected Bidder that is awarded a Contract by the Agency.
- 8. **Department or MDH** – Maryland Department of Health.

9. **Go-Live Date** – The date, as specified in the Notice to Proceed, when the Contractor must begin providing all services required by this solicitation. See Section 1.4.
10. **Invitation for Bids (IFB)** – This Invitation for Bids solicitation issued by the Agenda, with the Solicitation Number and date of issuance indicated in the IFB Key Information Summary Sheet (near the beginning of the solicitation, after the Title Page and Notice to Vendors), including any addenda.
11. **Local Time** – Time in the Eastern Time Zone as observed by the Agency. Unless otherwise specified, all stated times shall be Local Time, even if not expressly designated as such.
12. **Normal Agency Business Hours** - Normal Agency business hours are 8:00 a.m. – 4:30 p.m. Monday through Friday except Agency Holidays.
13. **Notice to Proceed (NTP)** – A written notice from the Procurement Officer that, subject to the conditions of the Contract, work under the Contract is to begin as of a specified date. The start date listed in the NTP is the Go-Live Date and is the official start date of the Contract for the actual delivery of services as described in this solicitation. After Contract Commencement, additional NTPs may be issued by either the Procurement Officer or the Agency Contract Monitor regarding the start date for any service included within this solicitation with a delayed or non-specified implementation date.
14. **Procurement Officer** – Prior to the award of any Contract, the sole point of contact in the Agency for purposes of this solicitation. After Contract award, the Procurement Officer has responsibilities as detailed in the Contract (Attachment A), including being the only Agency representative who can authorize changes to the Contract. The Agency may change the Procurement Officer at any time by written notice to the Contractor.
15. **Agency** – The Anne Arundel County Mental Health Agency, Inc.
16. **Technical Offer** – A Bidder’s response to the Scope of Work requirements of this IFB. A Bidder’s Technical Offer will be determined to be acceptable or not acceptable prior to any opening of a Bidder’s Bid Price Form. See IFB Section 4.2 for more information.
17. **Total Bid Price** - The Bidder’s total price for services in response to this solicitation, included in the Bid in Attachment F – Bid Form, and used in determining the recommended awardee (see IFB Section 1.12).

1.3 Contract Type

The Contract resulting from this solicitation shall be a unit price contract. See attached Contract template.

1.4 Contract Duration

- 1.4.1 The Contract that results from this solicitation shall commence as of the date the Contract is signed by the Agency following any required approvals of the Contract, including approval by the Board of Directors, if such approval is required (“Contract Commencement”).
- 1.4.2 The period of time from the date of Contract Commencement through the Go-Live Date (see Section 1.2 definition and Section 1.4.3) will be the Contract “Start-up Period.” During the Start-up Period the Contractor shall perform start-up activities such as are necessary to enable the Contractor to begin the successful performance of Contract activities as of the Go-Live Date. A one-time start up award may be available; allowable expenses include staffing costs associated with startup, information technology, and staff training. Startup funds can also be used to offset the staggered admission pattern for these individuals.

- 1.4.3 As of the Go-Live Date contained in a Notice to Proceed (see Section 1.2 definition), anticipated to be on or about December 1, 2021, the Contractor shall perform all activities required by the Contract, including the requirements of this solicitation, for the compensation described in its Bid.
- 1.4.4 The duration of the Contract will be for the period of time from Contract Commencement to the Go-Live Date (the Start-Up Period as described in Section 1.4.2) through June 30, 2022. This Contract may be extended annually at the sole discretion of the Agency.
- 1.4.5 The Contractor's obligations to pay invoices to subcontractors that provided services during the Contract term, as well as the audit, confidentiality, document retention, and indemnification obligations of the Contract shall survive expiration or termination of the Contract and continue in effect until all such obligations are satisfied.

1.5 Procurement Officer

1.5.1 Procurement Officer

The sole point of contact in the Agency for purposes of this solicitation prior to the award of any Contract is the Procurement Officer at the address listed below:

Chelsea Bednarczyk, Chief Operating Officer
Anne Arundel County Mental Health Agency, Inc.
1 Truman Parkway, Suite 101
Annapolis, MD 21401
cbednarczyk@aamentalhealth.org
Phone Number: (410) 222-7858
Fax Number: (410) 222-7881

1.6 Pre-Bid Conference

A Pre-Bid Conference (the Conference) will be held at the date, time, and location indicated in the IFB Key Information Summary Sheet (near the beginning of the solicitation, after the Title Page and Notice to Vendors). All prospective Bidders are encouraged to attend in order to facilitate better preparation of their Bids.

The Conference will be summarized. As promptly as is feasible subsequent to the Conference, a summary of the Conference and all questions and answers known at that time will be distributed to all prospective Bidders known to have received a copy of this IFB. This summary, as well as the questions and answers, will also be posted on the Agency website at www.aamentalhealth.org.

1.7 Questions

Written questions from prospective Bidders will be accepted by the Procurement Officer prior to the Conference. If possible and appropriate, such questions will be answered at the Conference. (No substantive question will be answered prior to the Conference.) Questions to the Procurement Officer shall be submitted via e-mail to the Procurement Officer's e-mail address indicated in the IFB Key Information Summary Sheet (near the beginning of the solicitation, after the Title Page and Notice to Vendors). Please identify in the subject line the Solicitation Title. Questions, both oral and written, will also be accepted from prospective Bidders attending the Conference. If possible and appropriate, these questions will be answered at the Conference.

Questions will also be accepted subsequent to the Conference and should be submitted to the Procurement Officer via email. Questions are requested to be submitted by October 1, 2021. All questions and answers will be posted to the Agency website at www.aamentalhealth.org within 5 business days.

1.8 Procurement Method

This Contract will be awarded in accordance with the Multi-Step Competitive Sealed Bidding method.

1.9 Bids Due (Closing) Date and Time

Bids, in the number and form set forth in Section 4.4 “Required Bid Submissions,” must be received by the Procurement Officer at the Procurement Officer’s address and no later than the Bid Due date and time indicated in the IFB Key Information Summary Sheet (near the beginning of the solicitation, after the Title Page and Notice to Vendors) in order to be considered.

Requests for extension of this time or date will not be granted. Bidders mailing Bids should allow sufficient mail delivery time to ensure timely receipt by the Procurement Officer.

Bids may be modified or withdrawn by written notice received by the Procurement Officer before the time and date set for the opening.

Bids may be submitted by e-mail or facsimile.

1.10 Receipt, Opening and Recording of Bids

1.10.1 Receipt. Upon receipt, each Bid and any timely modification(s) to a Bid shall be stored in a secure place until the time and date set for bid opening. Before Bid opening, the Agency may not disclose the identity of any Bidder.

1.10.2 Opening and Recording. Technical Offers from each Bidder will not be opened publicly but will be opened in the presence of at least two (2) Agency employees. After review of the Technical Offers, a determination will be made as to whether each Bidder’s Technical Offer is acceptable or not acceptable (see IFB Section 4.2). Afterwards, Bid Forms and timely modifications to Bid Forms from only those Bidders whose Technical Offers have been determined to be acceptable shall be opened publicly at the time, date, and place designated in the IFB. The name of each such Bidder, their Total Bid Price, and such other information as is deemed appropriate shall be read aloud or otherwise made available. Bid Forms from Bidders whose Technical Offers have been found unacceptable shall be returned unopened. At the time of Bid Form opening, a Register of Bids will be prepared that identifies each Bidder, including Bidders whose Technical Offers were not found to be acceptable. The Register of Bids shall be open to inspection immediately after the public Bid opening

1.10.3 The Bid Opening shall be Monday, October 18, 2021.

1.11 Confidentiality of Bids

The Bids shall be tabulated or a Bid abstract made. Material so designated as confidential shall accompany the Bid and shall be readily separable from the Bid in order to facilitate public inspection of the non-confidential portion of the Bid, including the Total Bid Price.

1.12 Award Basis

The Contract shall be awarded to the responsible Bidder submitting a responsive Bid with the most favorable Total Bid Price, after that Bidder's Technical Offer has been found to be acceptable, for providing the goods and services as specified in this IFB. The most favorable Total Bid Price will be the lowest price total on **Attachment F** - Bid Form. Grant funding of \$250,000 is available for this project annually.

1.13 Incurred Expenses

The Agency will not be responsible for any costs incurred by any Bidder in preparing and submitting a Bid or in performing any other activities related to submitting a Bid in response to this solicitation.

1.14 Bidder Responsibilities

The selected Bidder shall be responsible for rendering services for which it has been selected as required by this IFB. All subcontractors shall be identified and a complete description of their role relative to the Bid shall be included in the Bidder's Bid.

If a Bidder that seeks to perform or provide the services required by this IFB is the subsidiary of another entity, all information submitted by the Bidder, such as but not limited to, references, financial reports, or experience and documentation (e.g. insurance policies, bonds, letters of credit) used to meet minimum qualifications, if any, shall pertain exclusively to the Bidder, unless the parent organization will guarantee the performance of the subsidiary. If applicable, the Bidder shall submit with its Bid an explicit statement, signed by an authorized representative of the

1.15 Verification of Registration and Tax Payment

Before a business entity can do business with the Agency it must be registered and in good standing with the State Department of Assessments and Taxation (SDAT). SDAT is located at State Office Building, Room 803, 301 West Preston Street, Baltimore, Maryland 21201. The SDAT website is <http://dat.maryland.gov/Pages/default.aspx> .

It is strongly recommended that any potential Bidder complete registration prior to the due date for receipt of Bids. A Bidder's failure to complete registration with SDAT may disqualify an otherwise successful Bidder from final consideration and recommendation for Contract award.

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SECTION 2 – MINIMUM QUALIFICATIONS

2.1 Bidder Minimum Qualifications

The Bidder must provide proof with its Bid that the following Minimum Qualifications have been met:

- 2.1.1 The Bidder shall have a current license through the Maryland Office of Health Care Quality (OHCQ) under COMAR 10.07.14 to operate in in Anne Arundel County or one of the surrounding counties (Baltimore City, Baltimore County, Calvert County, Kent County, Howard County, Prince George’s County, Queen Anne’s County, or Talbot County). As proof of meeting this requirement, the Bidder shall provide with its Bid a copy of the license with the current address.
- 2.1.2 The Bidder shall be meet the Centers for Medicare & Medicaid Services (CMS) Home and Community-Based Services (HCBS) Setting Rules. As proof of meeting this requirement, the Bidder shall provide with its bid verification from CMS. Bidder’s that do not currently meet the CMS HCBS Setting Rules shall provide a detailed plan and timeline for coming into compliance with the Setting Rules.

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SECTION 3 – SCOPE OF WORK

3.1 Background and Purpose

The Agency is issuing this solicitation for the purposes of contracting with licensed Assisted Living Facilities (ALF) to provide an Assisted Living Behavioral Health Program (ALF-BHS) that can provide services for 4 to 6 older adults In Anne Arundel or the surrounding counties. With the assistance of the Agency, the Contractor will develop the program and operate a model that delivers services for 4 to 6 older adults with serious mental illness in single occupancy rooms.

The Behavioral Health Administration (BHA) has moved to decentralize the management of behavioral health services to Maryland Medicaid recipients and eligible uninsured residents by developing Local Behavioral Health authorities, Core Service Agencies, and Local Addictions Authorities. The Core Service Agency (CSA) acting as the designee of the Maryland Department of Health (hereafter known as “the Department”), shall complete a competitive procurement for its respective jurisdiction for all grant-funded activities.

The Anne Arundel County Mental Health Agency, Inc. (AACMHA or the Agency), the Core Service Agency (CSA) is responsible for planning and systems management of the Public Behavioral Health Systems for the residents of Anne Arundel County.

Resources for older adults with behavioral health conditions are sparse in general within Maryland. Public Behavioral Health System utilization data indicates that older adults are underrepresented among those served considering the percentage of Medicaid recipients who are over age 65. Hospitals report extended stays for this population, which has been further exacerbated by the COVID-19 pandemic. The rates of suicide and overdose among this population continues to increase. Healthcare for the Homeless reports an increase in older adults experiencing homelessness for the first time in their lives.

There are few community options that provide an alternative to nursing facility services for older adults with behavioral health conditions who require assistance with activities of daily living and or have medical conditions that require nursing assessment and delegation. Maryland’s long-term services and support lack behavioral health expertise and Maryland public behavioral health system lacks services that are accessible and or meet the needs of older adults.

An assisted living service with behavioral health wrap around services is needed to support this population and prevent unnecessary institutionalization.

3.2 Scope of Work - Requirements

The Contractor shall:

1. Possess and maintain a license through the Maryland Office of Health Care Quality (OHCQ) under COMAR 10.07.14.
2. Meet the Centers for Medicare & Medicaid Services (CMS) Home and Community-Based Services (HCBS) Setting Rules.
3. Provide a plan for all admissions on the template provided by the Agency. AACMHA will approve all admissions to the program funded through this grant. The admission (medical necessity) criteria include:
 - a. Need for assistance with ADLs or other somatic problems requiring nurse supervision
 - b. A diagnosis of serious mental illness
 - c. Income less than 3 times SSI and assets less than \$2,000
 - d. Being at risk of admission to state psychiatric hospital or discharging from state psychiatric hospital
 - e. Having a Level I PASRR screen completed.

4. Have an adequate disaster and relocation plan for the site(s). The Contractor shall provide a copy of their disaster and relocation plan.
5. Screen residents for fall risk, depression, anxiety, and substance use disorder. The Contractor shall provide a copy of the assessment used to screen residents.
6. Assure that all individuals served through the program apply for all eligible Medicaid benefits including registry for Community Options Waiver and that individuals served contribute a portion of their SSI/SSDI income toward the cost of care. Individuals shall receive \$100.00 for incidentals from their SSD/SSDI income. The Contractor shall provide a copy of the policy on entitlements.
7. Act as the representative payee to those individuals who do not have a representative payee. For those who do have a representative payee, the ALF will coordinate with the payee to ensure that the associated cost of care is paid. The Contractor shall provide a copy of the policy on representative payees.
8. Work with the Agency to coordinate outpatient behavioral health services and/or mobile treatment services for individuals residing in the ALF.
9. Work with the Agency to coordinate behavioral health wellness resources (e.g., 12 step programs, peer supports, WRAP class) Integration of behavioral health wellness resources (e.g., 12 step programs, peer support, Wellness Recovery Action Planning (WRAP) classes and programming encouraging healthy coping skills.
10. Have a discharge notification process that includes notification to both the resident and the Agency at least 30-days in advance and ensures safe discharge plan. The Contractor shall provide a copy of the discharge policy and the template for discharge planning.

Staffing

The Contractor shall:

1. Employ staff trained to understand behavioral health conditions in older adults, de-escalation techniques, person centered practices, behavioral health supports and resources. Mental Health First Aid for Older Adults training, or similar curriculum, is recommended. Complete a minimum of one mental health training annually for staff. The Contractor shall provide a copy of the training plan.
2. Ensure that staff have adequate behavioral health training. AACMHA will assist in providing the training.
3. Conduct background checks on all staff and care providers.

Monitoring and Reporting

The Contractor shall:

1. Cooperate with the Agency's Older Adult Behavioral Health PASRR Specialist in monthly monitoring of ALF services for the individuals served.
2. Cooperate with the Agency's Older Adult Behavioral Health PASRR Specialist in annual monitoring of the ALF to ensure the facility maintains licensure, has a current fire inspection, and meets all other contractual obligations including adequate training of staff.
3. Coordinate and comply with any Community Forensic Aftercare Program reporting requirements for individuals on Conditional Release.

3.3 Insurance Requirements

- 3.3.1 The Contractor shall maintain Commercial General Liability Insurance to cover losses resulting from, or arising out of, Contractor action or inaction in the performance of the Contract by the Contractor, its agents, servants, employees, or subcontractors, with a limit of \$1,000,000 per occurrence and \$2,000,000 aggregate.
- 3.3.2 Within five (5) Business Days of recommendation for Contract award, and before any work begins, the Contractor shall provide the Procurement Officer with current certificates of insurance, and shall update such certificates periodically, but no less than annually in multi-year contracts, as directed by the Contract Monitor.

3.4 Invoicing

3.4.1 General

(a) All invoices for services shall be signed by the Contractor and submitted to the Contract Monitor. All invoices shall include the following information:

- Contractor name and address;
- Remittance address;
- Federal taxpayer identification number (or if sole proprietorship, the individual’s social security number);
- Invoice period (i.e. time period during which services covered by invoice were performed);
- Invoice date;
- Invoice number;
- Goods or services provided; and
- Amount due.

Invoices submitted without the required information cannot be processed for payment until the Contractor provides the required information.

(b) The Agency reserves the right to reduce or withhold Contract payment in the event the Contractor does not provide the Agency with all required deliverables within the time frame specified in the Contract or in the event that the Contractor otherwise materially breaches the terms and conditions of the Contract until such time as the Contractor brings itself into full compliance with the Contract.

3.4.2 Invoice Submission Schedule

The Contractor shall submit invoices in accordance with the following schedule:

Invoices are due by the 15th of the month following the month in which services were performed.

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SECTION 4 – BID FORMAT

4.1 Two Part Submission

Bids shall be submitted in the following manner:

- a. A Technical Offer, including any sample(s) if appropriate, but not including any Bid pricing/cost information (see Section 4.2); and
- b. A Bid Price Form including all Bid pricing/cost information (see Section 4.3)

One original and three (3) copies of each, the Technical Offer and the Bid Price Form, shall be placed in separate, sealed envelopes or other appropriate packaging, with labels indicating “Technical Offer” or “Bid Price Form” as appropriate. These two separate envelopes/packages should then be placed in a singled sealed envelope or other appropriate package along with any Minimum Qualification documentation that may be required (see Section 2) and all other Required Bid Submissions (see Section 4.4). This single envelope/package shall bear the IFB title and number, name and address of the Bidder, and closing date and time for receipt of the Bids.

4.2 Technical Offer

4.2.1 Technical Offer Requirements

- a. The Bidder shall address each Scope of Work requirement (Section 3.2) in its Technical Offer and describe how its proposed services will meet or exceed the requirement(s). Any paragraph in the Technical Offer that responds to a Scope of Work (Section 3.2) requirement shall include an explanation of how the work will be done. Any exception to a requirement, term, or condition may result in having the Bid classified as not responsive or the Bidder deemed not responsible, and the Technical Offer determined not acceptable.

Responses in the Bidder’s Technical Offer should reference the organization and numbering of Sections in the IFB (ex. “Section 3.2.1 Response . . . ; “Section 3.2.2 Response . . . ,” etc.). This Technical Offer organization will allow Agency officials to “map” Bidder responses directly to IFB requirements by Section number and will aid in the review process.

- b. The Bidder shall give a definitive description of the proposed plan to meet the requirements of the IFB, i.e., a Work Plan. It shall include the specific methodology and techniques to be used by the Bidder in providing the required services as outlined in IFB Section 3, Scope of Work. The description shall include an outline of the overall management concepts employed by the Bidder and a project management plan, including project control mechanisms and overall timelines. Project deadlines considered contract deliverables must be recognized in the Work Plan.
- c. The Bidder shall identify the location(s) in which it proposes to provide the services, including, if applicable, any current facilities that it operates, and any required construction to satisfy the Agency’s requirements as outlined in this IFB.

- 4.2.2 Technical Offers will not be opened publicly, but will be opened in the presence of at least two (2) Agency employees. Technical Offers will then be reviewed. Prior to the Bid Price Form opening, Technical Offers will be shown only to Agency employees and members of the review committee with a legitimate interest in them.

4.2.3 Technical Criteria

The following criteria shall be used to determine the acceptability of each item listed or provided under Section 4.2.1 “Technical Offer Requirements.” All criteria are pass/fail. Technical Offers are not ranked but determined to be acceptable or not acceptable.

- a. The Bidder’s comprehensive understanding of work requirements and mastery of the subject matter, including an explanation of how the work will be done (i.e., response to IFB Section 3.2 requirements). (see Section 4.2.1.a.)
- b. The Bidder’s Work Plan. (see Section 4.2.1.b.)

4.2.4 After Technical Offers have been reviewed, Bidders whose Technical Offers are determined not to be acceptable, based upon the technical criteria as set forth in Section 4.2.3, will be notified in writing that their Bids are not acceptable and being rejected. Included with the rejection notice, the unopened Bid Form will also be returned. Bid Forms from only those Bidders whose Technical Offers have been found acceptable shall be publicly opened at the date, time, and place specified in the Key Information Summary Sheet and IFB Section 1.10.3.

4.3 Bid Price Form

The Bid shall contain all price information in the format specified on the Bid Form (**Attachment F**). Complete the Bid Form only as provided in the Bid Pricing Instructions. Do not amend, alter, or leave blank any items on the Bid Form or include additional clarifying or contingent language on or attached to the Bid Form. If option years are included, Bidders must submit Bids for each option year. Failure to adhere to any of these instructions may result in the Bid being determined to be non-responsive and rejected by the Agency.

4.4 Required Bid Submissions

Bidders shall include the following with their Bid:

4.4.1 Transmittal Letter:

A Transmittal Letter shall accompany the Bid. The purpose of this letter is to transmit the Bid and acknowledge the receipt of any addenda. The Transmittal Letter should be brief and signed by an individual who is authorized to commit the Bidder to the services and requirements as stated in this IFB. The Transmittal Letter should include the following:

- Name and address of the Bidder;
- Name, title, e-mail address, and telephone number of primary contact for the Bidder;
- Solicitation Title that the Bid is in response to;
- Signature, typed name, and title of an individual authorized to commit the Bidder to its Bid;
- Federal Employer Identification Number (FEIN) of the Bidder, or if a single individual, that individual’s Social Security Number (SSN).

Any information which is claimed to be confidential is to be noted by reference and included after the Transmittal Letter. An explanation for each claim of confidentiality shall be included (see Section 1.11 “Confidentiality of Bids”).

4.4.2 **Minimum Qualifications Documentation:**

The Bidder shall submit any Minimum Qualifications documentation that may be required, as set forth in Section 2 “Bidder Minimum Qualifications.”

4.4.5 **References:**

At least three (3) references are requested from customers who are capable of documenting the Bidder’s ability to provide the services specified in this IFB. References used to meet any Bidder Minimum Qualifications (see Section 2) may be used to meet this request. Each reference shall be from a client for whom the Bidder has provided services within the past five (5) years and shall include the following information:

- a. Name of client organization;
- b. Name, title, telephone number, and e-mail address, if available, of point of contact for client organization; and
- c. Value, type, duration, and description of services provided.

The Agency reserves the right to request additional references or utilize references not provided by a Bidder.

4.4.6 **Financial Capabilities:**

The Bidder shall include Financial Statements, preferably a Profit and Loss (P&L) Statement and a Balance Sheet, for the last two (2) years (independently audited preferred).

4.4.7 **Certificate of Insurance:**

The Bidder shall provide a copy of the Bidder’s current certificate of insurance. The recommended awardee must provide a certificate of insurance with the prescribed limits set forth in Section 3.3 “Insurance Requirements,” naming the Agency as an additional insured if required, within five (5) Business Days from notification by the Procurement Officer that the Bidder has been determined to be the apparent awardee.

4.5 Delivery

Bidders may either mail or hand-deliver Bids.

- 4.5.1 For U.S. Postal Service deliveries, any bid that has been received at the appropriate mail room, or typical place of mail receipt for the respective procuring unit by the time and date listed in the IFB will be deemed to be timely. If a Bidder chooses to use the U.S. Postal Service for delivery, the Agency recommends that it use Express Mail, Priority Mail, or Certified Mail only as these are the only forms for which both the date and time of receipt can be verified by the Agency. It could take several days for an item sent by first class mail to make its way by normal internal mail to the procuring unit and a Bidder using first class mail will not be able to prove a timely delivery at the mailroom.
- 4.5.2 Hand-delivery includes delivery by commercial carrier acting as agent for the Bidder. For any type of direct (non-mail) delivery, a Bidder is advised to secure a dated, signed, and time-stamped (or otherwise indicated) receipt of delivery.

ATTACHMENT F – BID PRICING INSTRUCTIONS

In order to assist Bidders in the preparation of their Bid and to comply with the requirements of this solicitation, Bid Pricing Instructions and a Bid Form have been prepared. Bidders shall submit their Bid on the Bid Form in accordance with the instructions on the Bid Form and as specified herein. Do not alter the Bid Form or the Bid Form may be rejected. The Bid Form is to be signed and dated, where requested, by an individual who is authorized to bind the Bidder to the prices entered on the Bid Form.

The Bid Form is used to calculate the Bidder's TOTAL BID PRICE. Follow these instructions carefully when completing your Bid Form:

- A) All Unit and Extended Prices must be clearly entered in dollars and cents, e.g., \$24.15. Make your decimal points clear and distinct.
- B) All Unit Prices must be the actual price per unit the Agency will pay for the specific item or service identified in this IFB and may not be contingent on any other factor or condition in any manner.
- C) All calculations shall be rounded to the nearest cent, i.e., .344 shall be .34 and .345 shall be .35.
- D) Any goods or services required through this IFB and proposed by the vendor at **No Cost to the Agency** must be clearly entered in the Unit Price, if appropriate, and Extended Price with **\$0.00**.
- E) Every blank in every Bid Form shall be filled in. Any blanks may result in the Bid being regarded as non-responsive and thus rejected. Any changes or corrections made to the Bid Form by the Bidder prior to submission shall be initialed and dated.
- F) Except as instructed on the Bid Form, nothing shall be entered on or attached to the Bid Form that alters or proposes conditions or contingencies on the prices. Alterations and/or conditions usually render the Bid non-responsive, which means it will be rejected.
- G) It is imperative that the prices included on the Bid Form have been entered correctly and calculated accurately by the Bidder and that the respective total prices agree with the entries on the Bid Form. Any incorrect entries or inaccurate calculations by the Bidder will be treated as provided in COMAR 21.05.03.03E and 21.05.02.12, and may cause the Bid to be rejected.
- H) If option years are included, Bidders must submit pricing for each option year. Any option to renew will be exercised at the sole discretion of the Agency and will comply with all terms and conditions in force at the time the option is exercised. If exercised, the option period shall be for a period identified in the IFB at the prices entered in the Bid Form.
- I) All Bid prices entered below are to be fully loaded prices that include all costs/expenses associated with the provision of services as required by the IFB. The Bid price shall include, but is not limited to, all: labor, profit/overhead, general operating, administrative, and all other expenses and costs necessary to perform the work set forth in the solicitation. No other amounts will be paid to the Contractor. If labor rates are requested, those amounts shall be fully-loaded rates; no overtime amounts will be paid.
- J) Unless indicated elsewhere in the IFB, sample amounts used for calculations on the Bid Form are typically estimates for bidding purposes only. The Agency does not guarantee a minimum or maximum number of units or usage in the performance of this Contract.
- K) Failure to adhere to any of these instructions may result in the Bid being determined non-responsive and rejected by the Agency.

ATTACHMENT F – BID FORM

BID FORM

The Bid shall contain all price information in the format specified on these pages. Complete the Bid Form only as provided in the Bid Pricing Instructions. Do not amend, alter or leave blank any items on the Bid Form. If option years are included, Bidders must submit Bids for each option year. Failure to adhere to any of these instructions may result in the bid being determined non-responsive and rejected by the Agency.

See attached Bid Form Excel sheet.

Submitted By:
Authorized Signature: _____ Date: _____
Printed Name and Title: _____
Bidder Name : _____
Bidder Address: _____
Location(s) from which services will be performed (City/Agency):

FEIN: _____ eMM # _____
Bidder Contact Information: Telephone: (____) ____ -- _____ Fax: (____) ____ -- _____
E-mail: _____

Anne Arundel County Mental Health Agency Special Needs Consumer Plan for Request of Funds

Date _____ MA _____ Fiscal Year 22 _____

Consumer Name Original Placement Date

Address

Requester Name

Relationship to Consumer

Provider Address

Telephone Fax

◆ ◆ ◆ ◆

Does care plan describe clinical goals? YES NO Comments _____

CSA Review of Service Plan Clinical _____ CSA Review of Service Plan Clinical Director _____

Last Fiscal Year 2021 Current Fiscal Year 2022

<u>FY Funds Requested</u> \$ _____	<u>Grant Funds Requested</u> \$ _____
<u>FY Funds Approved</u> \$ _____	<u>Fee for Service Funds</u> \$ _____
<u>FY Funds Used</u> \$ _____	<u>Total Cost to State</u> \$ _____
	<u>Estimated Client Contribution</u> \$ _____

Funds Available? Yes No Grant funds Per Diem \$ _____

Executive Director's Signature Date

Note: Failure to notify the Core Service Agency (CSA) of change(s) in an individual's Service Plan or living arrangements within 48 hours of the change occurring, may result in non-payment by the CSA until a new Plan has been submitted and approved.

This approved Plan is the Contract with the CSA to provide care for the patient named above from July 1, 2021 to June 30, 2022.