

5. SECTION B - SCOPE OF SERVICES:**5.1. BACKGROUND**

- A. The Montgomery County, Maryland (“County”) Department of Health and Human Services (“DHHS”) Aging and Disability Services Unit (“A&D”) has provided a program of visitation to isolated seniors residing in homes, apartments, and group homes throughout the County, called The Friendly Visitation Program (“Program”). The target population served under this Program consists of existing participants and new participants, who must be 60 years and older living in the County, who are isolated (“Clients”). Regular contact with others has been shown to be desirable and beneficial to seniors’ general health and wellness. The goal of this Program is to help Clients alleviate feelings of isolation and loneliness and to keep Clients connected to the community. DHHS’ mission is to address the safety, self-sufficiency, health, and well-being needs of the County community and DHHS Clients through the delivery of health, behavioral health, and social services.

**5.2. INTENT**

- A. DHHS is seeking an experienced, and capable entity to provide the Program utilizing volunteers and/or paid staff (“Staff”). The Program develops a one-on-one relationship and regular monitoring of Clients’ overall health status on a non-sectarian basis. The County’s intent is to help isolated seniors establish and/or maintain positive emotional well-being.
- B. The County intends to award one (1) contract under this Request for Proposals (RFP). The total estimated Fiscal Year 2026 compensation for the contract resulting from this Solicitation is approximately \$124,351. 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.
- C. 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.
- D. The entity who is awarded a contract resulting from this RFP, herein after referred to as the “Contractor”, must provide the services required by the County based on the Scope of Services stated in this RFP and its resulting contract.

**5.3. SCOPE OF SERVICES**

- A. The Contractor must recruit, screen, train and supervise Staff to provide visitation services and match them with Clients. These Clients may be isolated for such reasons as age, physical illness, place of residence, and/or physical or mental impairment.
- B. As part of the Program, the Contractor must provide the following services:
- i. Accept Client referrals from County social service programs, other public and private agencies, family members, friends, and other acquaintances of potential Clients.
  - ii. Train all assigned Staff before they provide services to Clients.
  - iii. Serve, at a minimum, 60 unduplicated Clients monthly. If the caseload falls below 60 Clients served in a month, the Contractor must submit, in writing, within fifteen (15) days following the end of each month, the Contractor’s plan to achieve the minimum caseload to the DHHS Contract Monitor.

- iv. Establish a mechanism and quality assurance procedure for collecting data on services received by Clients, services provided by staff and a waitlist for whom the Contractor has not found a suitable friendly visitor match due to geographic location of the Client, personal interests, and/or other factors.
- v. Submit the required monthly and annual reports, as outlined in this this RFP under Section 5.4 Records and Reports.
- vi. Have a screening process for identifying and assigning Staff to service Clients, including people who speak languages other than English.
- vii. Develop, implement, and maintain written program policies and procedures, to include outcome measures related to the services provided through this RFP, subject to County approval, within ninety (90) days of the effective date of the contract resulting from this RFP.
- viii. Provide Clients with a minimum of four (4) visits per month for an hour per visit or for the duration based on the Client's preference. In-person visits are preferred, but dependent upon Client's health status and other factors, telephone visits are allowed. The Contractor must follow up with Staff to ensure visitation hours are being met monthly and provided on monthly and annual reports.
- ix. Provide administrative support and on-going training to Staff.
- x. Establish a guideline to provide referrals to Clients with other needs for any services deemed necessary by the Contractor and refer Clients to other County resources.
- xi. Establish a procedure to follow-up with Staff and Clients to confirm the Program is provided to its full potential.
- xii. Have a County-approved implementation plan on the start date of the contract to ensure continuation of services for Clients 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.
- xiii. Provide and maintain enough professional and administrative support Staff, including adequate Staff for visitation services.

C. The Contractor must provide the following Client-oriented activities:

- i. Publicize the Program to potential referral sources. All Program publicity must include that services are funded in part by the Montgomery County Department of Health and Human Services.
- ii. Develop and implement an application process for potential new Clients.
- iii. Develop criteria to assess the needs, appropriateness, and eligibility of potential Clients for the Program to ensure that Staff can provide the visitation service with no difficulty. Priority must be given to homebound seniors, not living in a group setting.
- iv. Develop and implement a process to match Staff with Clients.
- v. Develop and implement a process for accepted Clients and their assigned Staff to meet and discuss the program and expectations. The Contractor must facilitate the meeting in person unless otherwise agreed upon by all parties.
- vi. Develop a process for referring Clients to other services, as needed.
- vii. Develop and maintain a waitlist of eligible Clients to ensure the Program can maintain the minimum number of required monthly Clients served. Monthly follow-up calls to the waitlist Clients are required.
- viii. Provide the following types of visits:
  - 1. Face-to-face visit, defined as an in-person visit between matched Staff and the Client at an agreed-upon location, which is typically the Client's home. Number of visits, visiting time per Client, and types of visits must be tracked and reported monthly using the County's DHHS Monthly Statistics Report (Attachment F). Scheduling visit and travel time must not be included in reporting.
  - 2. Telephone visit, defined as a telephone conversation between the matched Staff

and the Client to provide social contact and/or monitor Client's physical and mental health status. A telephone visit may substitute for a face-to-face visit due to scheduling conflicts, medical reasons, or other factors with prior approval by the County. The number of calls, duration of the call per Client, and type of visit must be tracked and reported monthly using the County's DHHS Monthly Statistics Report (Attachment F).

3. A follow-up call each month is required by the Contractor to all Clients on the wait list. The Contractor must make one (1) successful follow-up call to each Client per month. This includes updating the Client on the status of finding a match, general well-being and ascertaining the Client's continued level of interest in the Program. A successful "follow-up" call is a call that involves actual speaking with the Client or Client's representative. The Contractor must document follow-up calls using the DHHS Follow-Up Call Report (Attachment H). The follow-up call must include the following:
  - a. Date of the call;
  - b. Client's name;
  - c. Staff name making the call;
  - d. Identity of the person with whom the caller spoke to (i.e Client, family member); and
  - e. A brief summary of the call that addresses the Client's well-being, the Client's interest in the program, updates provided to the Client, and any further services offered, or actions taken by the Contractor representative.
4. Within thirty (30) days of the effective date of the contract resulting from this RFP, the Contractor must provide the County a written outline of talking points for the caller's use when making a follow-up call for County approval.

D. The Contractor must provide the following Staff-oriented activities:

- i. A plan to recruit Staff, including Staff who speak languages other than English, to serve as friendly visitors for Clients.
- ii. Develop a Staff screening process that includes a face-to-face interview.
- iii. Collect data from Staff for reporting related to services provided and Clients served, as required by the County.
- iv. Conduct criminal background checks and any other pertinent background checks for the determination of a Staff's suitability to provide services under a resulting contract. The Contractor must ensure that no individual who refuses to submit to a criminal background check provides services to Clients. Any employee who has a criminal conviction for abuse, neglect, or exploitation of children or adults must not provide services to DHHS Clients under any resulting contract from this solicitation. If the Contractor hires a Staff person who has a criminal conviction, the reasons for hiring must be clearly documented in the personnel record and may not work until approval from the County. All criminal background checks must be made available to the County upon request.
- v. Review of a minimum of three (3) personal and/or professional references from the prospective Staff.
- vi. The Contractor must comply with DHHS Background Clearance policy requirements for any person having unsupervised contact with a vulnerable population, including children, the disabled and/or the elderly, must be appropriately screened prior to providing services under the contract resulting from this solicitation. All Personnel who are found to have a verified history of child physical abuse, neglect, or sexual abuse must not provide services under the resulting contract from this RFP.  
<http://www.montgomerycountymd.gov/HHS/DoingBuswDHHS.html>.
- vii. Develop and implement a written agreement, subject to County approval, with each Staff

- for a one-year commitment to the Program with renewal annually.
- viii. Conduct a training program for Staff prior to matching them to a client, including providing training during evening weekdays, to accommodate Staff schedules.
  - ix. Develop a procedure for matching the Staff with Clients and formally introducing the Staff to the Clients.
  - x. Provide professional supervision, education, and support to Staff through training, staff consultations, in-service education, newsletters, and Staff recognition activities. All Staff must be trained prior to being matched to Clients.
- E. 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 provide Background Checks for Staff (<http://www.montgomerycountymd.gov/HHS/DoingBuswDHHS.html>), and sign a Business Associate Agreement (Attachment D) with the County prior to execution of a contract and comply with its provisions.
- F. Upon 90 days of executing the contract resulting from this RFP, , the Contractor must provide a detailed transition plan for tasks needed to be completed in the event of the expiration or termination of the contract for an orderly transition, in whole or in part, to the County, including, without limitation, the transfer of all Clients' 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.

#### **5.4. RECORDS AND REPORTS**

- A. The Contractor must collect and tabulate data for statistical reporting related to services provided and Clients served, as required by the County and other agencies.
- B. The Contractor must develop and maintain the reports described below and must submit them to the County when indicated. As part of its data collection efforts and information system for this Program, the Contractor must develop a method for collecting and verifying data, so service delivery reports are complete and accurate. The Contractor must submit the following:
1. Monthly and annual statistical reports using the DHHS Monthly Statistics Report (Attachment F) for Clients' statistical data, Monthly Client Volunteer/Staff Master Match Form (Attachment G), Follow Up Call Report (Attachment H) and the DHHS Annual and Program Report (Attachment I).
  2. Any modification to these required reports must be approved by the County. The monthly reports must be submitted to the County no later than thirty (15) days following the end of each month. The annual report must be submitted no later than the final day of the month following the end of the County's fiscal year. Upon request by the County, the Contractor must be able to report on the longevity of Clients in the Program.
  3. Quarterly narrative service reports, which delineate program activities, including publicity efforts, outreach to Clients, and observations of any barriers to services in the Program. Quarterly reports must be submitted to the County by the final day of the month, following the quarter in which services were provided.
- C. The Contractor must provide any additional data as required by the County.

#### **5.5. INVOICES**

- A. The Contractor must submit monthly invoices in a format approved by the County no later than fifteen (15) days following the end of each month. Upon receipt, acceptance and approval of the Contractor's invoice, the County will make payment, net thirty (30) days, for expenses incurred by the Contractor in providing the goods and services described in the solicitation. Invoices must be sent to the Contract Monitor designated by the County.

**5.6 PERFORMANCE MEASURES AND OUTCOMES**

- A. The Contractor must work with the County, and within 90 days of the execution of the contract resulting from this RFP, to develop and refine outcome measures related to the services provided through this RFP, which support achievement of the goals and objectives of the program and the mission of the County.
- B. The Contractor must conduct an annual satisfaction survey to all Clients in a format approved by the County. Of those surveys, a minimum of 80% must be returned. This survey must ask the Client to rate their recent experience with the Program in each of the following areas:

|                           | Very Satisfied | Satisfied | Not satisfied | Very Unsatisfied | Don't Know /Not applicable |
|---------------------------|----------------|-----------|---------------|------------------|----------------------------|
| Responsiveness/Timeliness |                |           |               |                  |                            |
| Courtesy/Respect          |                |           |               |                  |                            |
| Overall Experience        |                |           |               |                  |                            |

The Contractor must receive a “Very Satisfied” or “Satisfied” rating, in each of the three categories listed above from at least 70% of those Clients who responded, to remain in compliance.

**6. SECTION C - PERFORMANCE PERIOD**

**6.1. TERM**

The effective date of this Contract begins upon signature by the Director, Office of Procurement. The period in which Contractor must perform all work under the Contract begins on the Contract’s effective date and ends after a one (1) year period. Contractor must also perform all work in accordance with time periods stated in the Scope of Services. Before this term for performance ends, the Director at his/her sole option may (but is not required to) renew the term. The Contractor’s satisfactory performance does not guarantee a renewal of the term. The Director may exercise this option to renew this term two (2) times for up to one (1) year each.

**6.2 PRICE ADJUSTMENTS**

6.2.1 Prices are fixed for the first term of this Contract. For any renewal term of this Contract, a price increase may be allowed as follows:

- a) If the County Council provides for an Inflationary Adjustment that applies to this Contract, the Contractor will receive the Inflationary Adjustment in the amount set forth by Council for the subject Fiscal Year. In this event, the Contractor may not seek any additional price increase(s) during the renewal term.
- b) If there is no Council-approved Inflationary Adjustment applicable to this Contract, the Contractor may request a price increase, subject to the following:

- 6.2.1.1. Approval or rejection by the Director, Office of Procurement, or designee. Must be submitted in writing to the Director, Office of Procurement, and accompanied by supporting documentation justifying the Contractor’s request. A request for any price adjustment may not be approved unless the Contractor submits to the County sufficient justification to support that the Contractor’s request is based on its net increase in costs in delivering the goods/services under the Contract.
- 6.2.1.2. Must be submitted sixty (60) days prior to Contract expiration date, if the Contract is being amended.
- 6.2.1.3. Must not be approved in an amount that exceeds the amount of the annual percentage change