

**REQUEST FOR PROPOSALS
IN PERSON FINANCIAL LITERACY PROGRAM**



ISSUED BY:

**CITY OF GLENARDEN, MD
8600 GLENARDEN PARKWAY
GLENARDEN, MD 20706
CITY MANAGER'S OFFICE**

PROPOSAL SUBMISSION DEADLINE DATE & TIME: SEPTEMBER 16, 2022 AT 12:00 PM

PROPOSALS WILL BE ACCEPTED UNTIL THE TIME AND DATE SPECIFIED. THE ENVELOPE MUST BE SEALED AND PROPERLY MARKED WITH THE RFP NUMBER, DATE AND HOUR OF PROPOSAL OPENING, PROPOSER'S NAME AND RETURN ADDRESS.

PRICING MUST REMAIN GOOD FOR 90 DAYS FOLLOWING THE BID OPENING DATE.

REQUEST FOR PROPOSALS
IN PERSON FINANCIAL LITERACY PROGRAM

Submit response:

City of Glenarden
ATTN: Consuella Barbour
City Manager's Office
8600 Glenarden Parkway
Glenarden, MD 20706
Phone (301) 773-2100

NOTE: This is a sealed request for qualifications and may NOT be faxed or emailed. Follow instructions contained within this document for proper instructions and return response.

Due date for responses to be received:

FRIDAY, September 16, 2022 AT 12:00 PM, EST

Company Name: _____

Name (Type or print): _____

Title: _____

Address: _____

E-Mail Address: _____

Phone Number: _____

Business Designation (Check one): Individual Sole Proprietor Partnership Public
Service Corporation Government/ Non-Profit

BID ENVELOPE MUST BE: 1) SEALED; 2) PROPERLY MARKED WITH BID NUMBER, DATE AND HOUR OF BID OPENING AND BIDDER'S RETURN ADDRESS; AND 3) RECEIVED BY THE OFFICE OF THE CITY MANAGER BEFORE THE BID OPENING TIME AND DATE IN ORDER TO BE ACCEPTED. ELECTRONIC SUBMISSION IS ALSO REQUIRED (PDF PREFERABLE).

Background Information

Being financially literate is the foundation for successfully managing money for a lifetime. Without financial knowledge, decisions may be costly and prevent a financially sound future. The City of Glenarden is seeking a vendor to administer a comprehensive financial literacy program directed to young adults and seniors.

The proposed program needs to be an existing, already-developed program housed by the selected contractor capable of serving at least 50 participants. The City is looking for an in-person, virtual or hybrid educational program. At a minimum, the available courses should cover personal finance, budgeting, credit and debt management, insurance, credit reports and credit scores, investing, financing higher education, banking, taxes, fraud awareness and consumer protection, savings, credit cards and loan basics. There is a strong preference for a program that can provide as many course topics as possible. There is a strong preference for a program that has a proven record to drive participation and ongoing engagement.

This Contract will be funded by the City's American Rescue Plan Act (ARPA) funds and is a limited time engagement.

SECTION 2 ADMINISTRATIVE INFORMATION

1. Issuing Officer: The Issuing Officer identified in the RFP cover sheet is the sole point of contact regarding the RFP from the date of issuance until a Notice of Intent to Award the Contract is issued.
2. Restriction on Communication: From the issue date of this RFP until a Notice of Intent to Award the Contract is issued Respondents may contact only the Issuing Officer. The Issuing Officer will respond only to written questions regarding the procurement process. Questions related to the interpretation of this RFP must be submitted as provided in Section 2. Oral questions related to the interpretation of this RFP will not be accepted.
3. Downloading the RFP from the Internet: The RFP document and any addenda to the RFP will be posted at [https://cityofglenarden.org/doing_business/requests_for_proposals_\(rfps\).php](https://cityofglenarden.org/doing_business/requests_for_proposals_(rfps).php). The Respondent is advised to check the website periodically for Addenda to this RFP, particularly if the Respondent downloaded the RFP from the Internet, as the Respondent may not automatically receive addenda. It is the Respondent's sole responsibility to check daily for addenda to posted documents.
4. Procurement Timetable: The dates provided in the procurement timetable on the RFP cover sheet are provided for informational and planning purposes. The City reserves the right to change the dates. If the City changes any of the deadlines for Respondent submissions, the City will issue an addendum to the RFP.
5. Questions, Requests for Clarification and Suggested Changes: Respondents are invited to submit written questions and requests for clarifications regarding the RFP. Respondents may also submit suggestions for changes to the specifications of this RFP. The questions, requests for clarifications or suggestions must be in writing and received by the Issuing Officer on or before

the date and time listed on the RFP cover sheet. Oral questions will not be permitted. If the questions, requests for clarifications or suggestions pertain to a specific section of the RFP, Respondent shall reference the page and section number(s). The City will send written responses to questions, requests for clarifications or suggestions received from Respondents on before the date listed on the RFP cover sheet. The City's written responses will become an addendum to the RFP. If the City decides to adopt a suggestion that modifies the RFP, the City will issue an addendum to the RFP. The City assumes no responsibility for oral representations made by its officers or employees unless such representations are confirmed in writing and incorporated into the RFP through an addendum.

6. Amendment to the RFP: The City reserves the right to amend the RFP at any time using an addendum. The Respondent shall acknowledge receipt of all addenda in its Proposal. If the City issues an addendum 7 days after the due date for receipt of Proposals, the City may, in its sole discretion, allow Respondents to amend their Proposals in response to the addendum.
7. Submission of Proposals: The City must receive the before the "Proposals Due" date and time listed on the RFP cover sheet. This is a mandatory specification and will not be waived by the City. Any Proposal received after this deadline will be rejected. Respondents must allow ample time to ensure timely receipt of their Proposals. It is the Respondent's responsibility to ensure that the Proposal is received prior to the deadline. Respondents must furnish all information necessary to enable the City to evaluate the Proposal. Oral information provided by the Respondent will not be considered part of the Respondent's Proposal unless it is reduced to writing.
8. Proposal Opening: The City will open Proposals after the deadline for submission of Proposals has passed. The Proposals will remain confidential until the City has issued a Notice of Intent to Award a Contract. However, the names of Respondents who submitted timely Proposals will be publicly available after the Proposal opening. The announcement of Respondents who timely submitted Proposals does not mean that an individual Proposal has been deemed technically compliant or accepted for evaluation.
9. Costs of Preparing the Proposal: The costs of preparation and delivery of the Proposal are solely the responsibility of the Respondent.
10. No Commitment to Contract: The City reserves the right to reject any or all Proposals received in response to this RFP at any time prior to the execution of the Contract. Issuance of this RFP in no way constitutes a commitment by the City to award a contract.
11. Reference Checks: The City reserves the right to contact any reference to assist in the evaluation of the Proposal, to verify information contained in the Proposal and to discuss the Respondent's qualifications and the qualifications of any subcontractor identified in the Proposal.

12. Verification of Proposal Contents: The content of a Proposal submitted by a Respondent is subject to verification. If the City determines in its sole discretion that the content is in any way misleading or inaccurate, the City may reject the Proposal.
13. Proposal Clarification Process: The City reserves the right to contact a Respondent after the submission of Proposals for the purpose of clarifying a Proposal. This contact may include written questions, interviews, site visits, a review of past performance if the Respondent has provided goods and/or services to the City or any other political subdivision wherever located or requests for corrective pages in the Respondent's Proposal. The City will not consider information received from or through Respondent if the information materially alters the content of the Proposal or the type of goods and/or services the Respondent is offering to the City. An individual authorized to legally bind the Respondent shall sign responses to any request for clarification. Responses shall be submitted to the City within the time specified in the City's request. Failure to comply with requests for additional information may result in rejection of the Proposal.
14. All Proposals become the property of the City and shall not be returned to the Respondent. Once the City issues a Notice of Intent to Award the Contract, the contents of all Proposals will be public records available for inspection by interested parties, except for information for which Respondent properly requests confidential treatment.
15. Release of Claims: By submitting a Proposal, the Respondent agrees that it will not bring any claim or cause of action against the City based on any misunderstanding concerning the information provided in the RFP or concerning the City's failure, negligent or otherwise, to provide the Respondent with pertinent information in this RFP.
16. Evaluation of Proposals Submitted Proposals that are timely submitted and are not rejected will be reviewed and evaluated in accordance with Section 5 of the RFP. The City will not necessarily award a Contract resulting from this RFP to the Respondent offering the lowest cost. Instead, the City will award the Contract(s) to the Responsible Respondent(s) whose Responsive Proposal the City believes will provide the best value to the City.
17. Award Notice and Acceptance Period Notice of Intent to Award the Contract(s) will be sent to all Respondents submitting a timely Proposal and may be posted at the website shown on the RFP cover sheet. Negotiation and execution of the Contract(s) shall be completed no later than forty-five (45) days from the date of the Notice of Intent to Award or such other time as designated by City. If the successful Respondent fails to negotiate and deliver an executed Contract by that date, the City, in its sole discretion, may cancel the award and award the Contract to the remaining Respondent the City Manager believes will provide the best value to the City.
18. No Contract Rights until Execution: No Respondent shall acquire any legal or equitable rights regarding the Contract unless and until the Contract has been fully executed by the successful Respondent and the City.

19. No Minimum Guaranteed: The City does not guarantee any minimum level of purchases under the Contract.

SECTION 3 FORM AND CONTENT OF PROPOSALS

3.1 Instructions

These instructions prescribe the format and content of the Proposal. They are designed to facilitate a uniform review process. Failure to adhere to the Proposal format may result in the rejection of the Proposal.

3.1.1 The Proposal shall be divided into two parts: (1) the Technical Proposal and (2) the Cost Proposal. The Technical Proposal and the Cost Proposal shall be labeled as separate files. The files shall be labeled with the following information:

Respondent Name – Technical Proposal

Respondent Name – Cost Proposal

3.1.2 If the Respondent designates any information in its Proposal as confidential pursuant to Section 2, the Respondent must also submit a public copy of the Proposal from which the confidential information has been excised and which is marked "Public Copy".

3.1.3 Proposals shall not contain promotional or display materials.

3.1.4 Attachments shall be referenced in the Proposal.

3.1.5 If a Respondent proposes more than one solution to the RFP specifications, each shall be labeled and submitted in a separate Proposal and each will be evaluated separately.

3.2 Technical Proposal

All information provided in the Technical Proposal is subject to consideration, evaluation, and scoring. The following documents and responses shall be included in the Technical Proposal in the order given below.

3.2.1 Exhibit 1 - Transmittal Letter (Required)

An individual authorized to legally bind the Respondent shall sign the transmittal letter. The letter shall include the Respondent's mailing address, electronic mail address, fax number and telephone number.

3.2.2 Exhibit 2 - Table of Contents

The Respondent shall include a table of contents of its Proposal, with page numbers, and submit the check list of submittals per Attachment 4.

3.2.3 Exhibit 3 – Executive Summary

The Respondent shall prepare an executive summary and overview of the goods and/or Services it is offering, including all the following information:

3.2.3.1 Statements that demonstrate that the Respondent has read, understands and agrees with the terms and conditions of the RFP including the Contract provisions in Section 6.

3.2.3.2 An overview of the Respondent's plans for complying with the specifications of this RFP.

3.2.3.3 Any other summary information the Respondent deems to be pertinent.

3.2.4 Exhibit 4 - Respondent Background Information

The Respondent shall provide the following general background information:

3.2.4.1 Name, address, telephone number, fax number and e-mail address of the Respondent including all d/b/a's or assumed names or other operating names of the Respondent and any local addresses and phone numbers.

3.2.4.2 Form of business entity, *e.g.*, corporation, partnership, proprietorship, limited liability company.

3.2.4.3 State of incorporation, state of formation or state of organization.

3.2.4.4 The location(s) including address and telephone numbers of the offices and other facilities that relate to the Respondent's performance under the terms of this RFP.

3.2.4.5 Number of employees.

3.2.4.6 Type of business.

3.2.4.7 Name, address and telephone number of the Respondent's representative to contact regarding all contractual and technical matters concerning the Proposal.

3.2.4.8 Name, address and telephone number of the Respondent's representative to contact regarding scheduling and other arrangements.

3.2.4.9 Name, contact information and qualifications of any subcontractors who will be involved with this project the Respondent proposes to use and the nature of the goods and/or services the subcontractor would perform.

3.2.5 Exhibit 5 - Personnel

The Respondent must provide resumes for all key personnel who will be involved in providing the goods and/or services contemplated by this RFP. The following information must be included in the resumes:

3.2.5.1 Full name.

3.2.5.2 Education.

3.2.5.3 Years of experience and employment history particularly as it relates to the specifications of the RFP.

3.2.6 Exhibit 6 - Termination, Litigation, Debarment

The Respondent must provide the following information for the past five (5) years:

3.2.6.1 Has the Respondent had a contract for goods and/or services terminated for any reason? If so, provide full details regarding the termination.

3.2.6.2 Describe any damages or penalties assessed against or dispute resolution settlements entered into by Respondent under any existing or past contracts for goods and/or services. Provide full details regarding the circumstances, including dollar amount of damages, penalties and settlement payments.

3.2.6.3 Describe any order, judgment or decree of any Federal or State authority barring, suspending or otherwise limiting the right of the Respondent to engage in any business, practice or activity.

3.2.6.4 A list and summary of all litigation or threatened litigation, administrative or regulatory proceedings or similar matters to which the Respondent or its officers have been a party.

3.2.6.5 Any irregularities discovered in any of the accounts maintained by the Respondent on behalf of others. Describe the circumstances and disposition of the irregularities.

Failure to disclose these matters may result in rejection of the Proposal or termination of any subsequent Contract. The above disclosures are a continuing requirement of the Respondent. Respondent shall provide written notification to the City of any such matter commencing or occurring after submission of a Proposal and with respect to the successful Respondent, following execution of the Contract.

3.2.7 Exhibit 7 - Acceptance of Terms and Conditions

By submitting a Proposal, Respondent acknowledges its acceptance of the terms and conditions of the RFP and the General Terms and Conditions without change except as otherwise expressly stated in its Proposal. If the Respondent takes exception to a provision, it must identify it by page and section number, state the reason for the exception and set forth in its Proposal the specific RFP or General Terms and Conditions language it proposes to include in place of the provision. If Respondent's

exceptions or responses materially alter the RFP or if the Respondent submits its own terms and conditions or otherwise fails to follow the process described herein, the City may reject the Proposal, in its sole discretion. Respondent must note any exceptions in Attachment 5.

3.2.8 Exhibit 8 - Certification Letter

The Respondent shall sign and submit with the Proposal, the document included as Attachment 1 (Certification Letter) in which the Respondent shall make the certifications included in Attachment 1.

3.2.9 Exhibit 9 - Authorization to Release Information

The Respondent shall sign and submit with the Proposal the document included as Attachment 2 (Authorization to Release Information Letter) in which the Respondent authorizes the release of information to the City.

3.2.10 Exhibit 10 - Firm Proposal Terms

The Respondent shall guarantee in writing the goods and/or services offered in the Proposal are currently available and that all Proposal terms, including price, will remain firm for the number days indicated on the RFP cover sheet following the deadline for submitting Proposals.

3.2.11 Exhibit 11 - Addendums

Provide signed copy of posted RFP addendums.

3.2.12 Exhibit 12 - Request for Confidentiality

The Respondent must sign and submit with the Proposal the document included as Attachment 3 Form 22 – Request for Confidentiality.

3.2.13 Exhibits 13 and 14 - Mandatory Specifications and Scored Technical Specifications

The Respondent shall answer whether or not it will comply with each specification in Section 4 of the RFP. Where the context requires more than a yes or no answer or the specific specification so indicates, Respondent shall explain how it will comply with the specification. Merely repeating the Section 4 specifications may be considered nonresponsive and result in the rejection of the Proposal. Proposals must identify any deviations from the specifications of the RFP or specifications the Respondent cannot satisfy. If the Respondent deviates from or cannot satisfy the specification(s) of this section, the City may reject the Proposal.

3.3 Exhibit 15 - Cost Proposal

The Respondent shall provide its Cost Proposal as a separate file for the proposed goods and/or services utilizing Attachment 6. All prices are quoted pursuant to the terms and conditions of this RFP. Respondent's Cost Proposal shall include an all-inclusive, itemized, total cost in U.S. Dollars (including all travel, expenses, etc. in prices) for the proposed services. All pricing to be FOB Destination, freight cost and all expenses included and based on Net 60 Days Payment Terms.

3.3.1 Contents. Cost proposals must itemize the various costs of the program and include the items that follow.

3.3.1.1 Implementation & planning costs. This cost should include, at a minimum, the following:

- (a) Course assignments and teaching notes,
- (b) Providing steps and timeline to “go live,” and
- (c) Program management and engagement.

3.3.1.2 Program marketing.

3.3.2 Evaluation of Cost Proposal. Cost proposals will be evaluated based upon total program cost in accordance with section 5.4

SECTION 4 SPECIFICATIONS

Overview

The successful Respondent shall provide the goods and/or services to the City using the Contract in accordance with the specifications as provided in this Section. The Respondent shall address each specification in this Section and indicate whether it will comply with the specification. If the context requires more than a yes or no answer or the section specifically indicates, Respondent shall explain how it will comply with the specification. Proposals must address each specification. Merely repeating the specifications may be considered non-responsive and may disqualify the Respondent. Proposals must identify any deviations from the specifications of this RFP or specifications the Respondent cannot satisfy. If the Respondent deviates from or cannot satisfy the specification(s) of this section, the City may reject the Proposal.

4.1 Exhibit 13 - Mandatory Specifications

All items listed in this section are Mandatory Specifications. Respondents must indicate either “yes” or “no” to each specification in their Proposals and provide an explanation as to how the specification is met. By indicating “yes” a Respondent agrees that it shall comply with that specification throughout the full term of the Contract, if the Respondent is successful. In addition, if specified by the specifications or if the context otherwise requires, the Respondent shall provide references and/or supportive materials to verify the Respondent’s compliance with the specification.

The City shall have the right to determine whether the supportive information and materials submitted by the Respondent demonstrate the Respondent will be able to comply with the Mandatory Specifications. If the City determines the responses and supportive materials do not demonstrate the Respondent will be able to comply with the Mandatory Specifications, the City may reject the Proposal.

4.1.1 Respondent has an existing education program focused on financial topics that has been in operation for at least 1 year.

4.1.2 Courses must be designed to be ***in-person OR virtual***, facilitated by the classroom educator and allow for customized, independent and group work done by the student.

4.1.3 Program has a minimum capacity of 5-25 in person students and up to 50 students virtually.

4.1.4 The program should be noncommercial and not include any references, links or any other association with commercial services or products.

4.1.5 Program includes courses that cover the following topic areas, at a minimum: personal finance, budgeting, credit and debt management, insurance, credit reports and credit scores, investing, financing higher education, banking, taxes, fraud awareness and consumer protection, savings, credit cards and loan basics.

4.1.6 Respondent must include a proposed implementation schedule. Upon award of a Contract for services, the City shall negotiate an implementation schedule with the successful Respondent.

4.2 Exhibit 14 - Scored Technical Specifications

All items listed below are Scored Technical Specifications. All specifications will be evaluated and scored by the evaluation committee in accordance with Section 5.

4.2.1 Course Content.

4.2.1.1 Provide a list of course content currently available.

4.2.1.2 Provide the prerequisites necessary for participants to successfully progress through the courses.

4.2.1.3 Provide examples from the courses.

4.2.1.4 Describe how the courses addresses diverse learners, including the gender participation gap, traditionally underrepresented minority students, students with disabilities and English learners.

4.2.1.5 Describe and provide examples of the type of testing or evaluation available for students and teachers.

4.2.2 Marketing. Describe how Respondent will market the financial literacy program.

4.2.3 Evidence of Effectiveness.

4.2.3.1 Provide how evaluation data was collected and an example of how an assessment informed program practice.

4.2.3.2 Provide source(s) of evaluation evidence, including any third party, independent evaluation.

4.2.3.3 Describe the benefits to students in terms of content and skills growth, attitudes and intentions.

4.2.4 Experience. The Respondent must provide the following information regarding its experience:

4.2.4.1 Number of years in business.

4.2.4.2 Number of years of experience with providing the types of goods and/or services sought by the RFP.

4.2.4.3 Letters of reference from three (3) previous customers or clients knowledgeable of the Respondent's performance in providing goods and/or services similar to the goods and/or services described in this RFP and a contact person and telephone number for each reference.

4.2.5 Reports. Describe the contents of reporting that could be provided to the City on a quarterly and annual basis.

4.2.6 Optional Features.

4.2.8.1 Provide detailed information for any optional items that may be available.

4.2.8.2 Include costs for these items in the Cost Proposal

4.2.8.3 Provide information about possible additional language applications.

SECTION 5 EVALUATION AND SELECTION

5.1 Introduction

This section describes the evaluation process that will be used to determine which Proposal(s) provides the greatest benefit to the City. The City will not necessarily award the Contract to the Respondent offering the lowest cost to the City. Instead, the City will award to the Respondent whose Responsive Proposal the City believes will provide the best value to the City.

5.2 Evaluation Committee

The City will conduct a comprehensive, fair and impartial evaluation of Proposals received in response to this RFP. The City will use an evaluation committee to review and evaluate the Technical Proposals. The evaluation committee will recommend an award based on the results of their evaluation to the City or to such other person or entity who must approve the recommendation.

5.3 Technical Proposal Evaluation and Scoring

All Technical Proposals will be evaluated to determine if they comply with the Mandatory Specifications. The evaluation committee will fully evaluate and score all Responsive Proposals submitted by Responsible Respondents in accordance with this Section. In addition to other RFP requirements, to be deemed a Responsive Proposal, the Technical Proposal must: • Answer “Yes” to all parts of Section 4.1 and include supportive materials as required to demonstrate the Respondent will be able to comply with the Mandatory Specifications (Pass/Fail) in that section and • Obtain the minimum score for the Technical Proposal. An addendum identifying the points assigned to the Scored Technical Specifications and the Cost Proposal and the minimum required Scored Technical score will be posted prior to the RFP closing.

5.4 Cost Proposal Scoring

5.4.1 The Cost Proposals will remain sealed during the evaluation of the Technical Proposals and any demonstrations/presentations. Only prospective Respondents who obtain the minimum score for their Technical Proposal will be considered during the cost evaluation phase of the review process. When a Technical Proposal does not meet the minimum score, the associated Cost Proposal will remain unopened. After the Technical Proposals are evaluated and scored, the Cost Proposals will be opened and scored.

5.4.2 The cost proposal for each respondent will be evaluated in comparison with the other cost proposals received; however, the number of points possible will be proportional to each respondent’s technical evaluation score. The technical evaluation points received (numerator) is divided by the technical evaluation points possible (denominator) and multiplied by the maximum number of points in the cost evaluation. This provides the total points possible for the respondent in the cost evaluation.

Points Possible for Respondent =
Technical Evaluation Points Received DIVIDED BY Technical Evaluation Points Possible TIMES
Maximum Points in Cost Evaluation

The lowest cost proposal (numerator) is divided by the cost proposal being evaluated (denominator) and multiplied by the points possible for the respondent. This provides the cost evaluation points awarded.

Cost Evaluation Points Awarded =
Lowest Cost Proposal Received DIVIDED BY Cost Proposal Being Evaluated TIMES Points Possible for Respondent

For example, suppose there are 10 maximum points in the cost evaluation. A respondent that receives 100% of the points possible in the technical evaluation has the opportunity to earn 100% of the points possible in the cost evaluation (e.g., 10 points). If the cost proposal is the lowest cost, the full 10 points will be awarded.

However, a respondent that receives only 50% of the points possible in the technical evaluation has the opportunity to earn only 50% of the points possible in the cost evaluation (e.g., 5 points). If the cost proposal is the lowest cost, only 5 points are awarded, compared to the 10 points that could have been awarded if the respondent had received the highest technical evaluation score.

5.5 Total Score The compliant Respondent's Technical Proposal points will be added to its Cost Proposal points to obtain the total points awarded for the Proposal.

SECTION 6 CONTRACT TERMS AND CONDITIONS

6.1 Contract Terms and Conditions

The Contract that the City expects to award as a result of this RFP shall comprise the specifications, terms and conditions of the RFP, written clarifications or changes made by the City to the RFP through an amendment to the RFP in accordance with the provisions of the RFP, the General Terms and Conditions, the offer of the successful Respondent contained in its Proposal, and any other terms deemed necessary by the City. No objection or amendment by a Respondent to the provisions or terms and conditions of the RFP or the General Terms and Conditions shall be incorporated into the Contract unless the City has explicitly accepted the Respondent's objection or amendment in writing.

The Contract terms and conditions in this Section 6 and to the extent referenced and linked to on the RFP cover page, and/or any Terms and Conditions attached to and accompanying this RFP as an attachment hereto will be incorporated into the Contract. The Terms and Conditions may be supplemented at the time of contract execution and are provided to enable Respondents to better evaluate the costs associated with the RFP specifications and the Contract. All costs associated with complying with these specifications should be included in any pricing quoted by the Respondent.

By submitting a Proposal, Respondent acknowledges its acceptance of the terms and conditions of the RFP and the General Terms and Conditions without change except as otherwise expressly stated in its Proposal. If the Respondent takes exception to a provision, it must identify it by page and section number, state the reason for the exception, and set forth in its Proposal the specific RFP or Terms and Conditions language it proposes to include in place of the provision. If Respondent's exceptions or proposed responses materially alter the RFP or if the Respondent submits its own terms and conditions

or otherwise fails to follow the process described herein, the City may reject the Proposal, in its sole discretion.

The City reserves the right to either award a Contract(s) without further negotiation with the successful Respondent or to negotiate Contract terms with the successful Respondent if the best interests of the City would be served.

Any ambiguity, vagueness, inconsistency or conflict, either internal to such modification(s) or arising when read in conjunction with other portions of the Contract, shall be construed strictly in favor of the City. Only those proposed modifications identified in the Notice of Intent to Award issued by the City as terms and conditions with which the City will or will not agree or further negotiate shall be part of the Contract, and the City may ignore all proposed modifications, accept one or more and ignore others, accept all or, through negotiations after an award, agree to compromise language concerning one or more proposed modifications to be incorporated into a final Contract between the parties. By executing and submitting its Proposal in response to this RFP, Respondent understands and agrees that the City may exercise its discretion not to consider any or all proposed modifications Respondent may request and may accept Respondent's proposal under the terms and conditions of this RFP and the General Terms and Conditions for Services.

6.2 Contractual Terms and Conditions – No Material Changes/Non-Negotiable Notwithstanding anything in this RFP to the contrary, Respondent may not take exception to or propose including language in any resulting contract that conflicts with or is otherwise inconsistent with the following:

6.2.1 Indemnification

Without specific authority to do so, the City or agencies, cannot enter into agreements indemnifying Respondents or any other entity, against third-party claims. A clause that intends to seek indemnification from the City, whether or not the clause contains the words "indemnity" or "indemnify," are not clauses to which the City may agree. The City will not agree to clause that includes the language "to the extent permitted by law" because, as explained, the City cannot indemnify Respondents to any extent.

6.3 Contract Length --The term of the Contract will begin and end on the dates indicated on the RFP cover sheet. The City shall have the sole option to renew the Contract upon the same or more favorable terms and conditions for up to the number of annual extensions identified on the RFP cover sheet.

6.5 Order of Precedence -- If there is a conflict or inconsistency between any documents comprising the Terms and Conditions, such conflict or inconsistency shall be resolved according to the following priority, ranked in descending order: (1) any terms and conditions specifically set forth in this Section 6 (Contract Terms and Conditions & Administration) under a subsection with a heading entitled Special Terms & Conditions; (2) the General Terms and Conditions for Services Contracts or Goods Contracts to the extent referenced and linked to on the RFP cover page the Contract; (3) if neither the General Terms and Conditions for Service Contracts or Goods Contracts are linked to on the RFP cover page, any terms and conditions attached to and accompanying this RFP; and (4) any terms and conditions specifically set forth in this Section 6 (Contract Terms and Conditions & Administration) set forth under a subsection with a title other than Special Terms & Conditions.

Attachment 1
Certification Letter

Alterations to this document are prohibited, see section 2.12.14.

[Date]

Consuella Barbour, Issuing Officer
8600 Glenarden Parkway
Glenarden, MD 20706

Dear Ms. Barbour:

I certify that the contents of the Proposal submitted on behalf of [Name of Respondent] _____ (Respondent) in response to City of Glenarden for RFP for in-person financial literacy program are true and accurate. I also certify that Respondent has not knowingly made any false statements in its Proposal.

Certification of Independence

I certify that I am a representative of Respondent expressly authorized to make the following certifications on behalf of Respondent. By submitting a Proposal in response to the RFP, I certify on behalf of the Respondent the following:

1. The Proposal has been developed independently, without consultation, communication or agreement with any employee or consultant to the City or with any person serving as a member of the evaluation committee.
2. The Proposal has been developed independently, without consultation, communication or agreement with any other Respondent or parties for the purpose of restricting competition.
3. Unless otherwise required by law, the information found in the Proposal has not been and will not be knowingly disclosed, directly or indirectly prior to City's issuance of the Notice of Intent to Award the contract.
4. No attempt has been made or will be made by Respondent to induce any other Respondent to submit or not to submit a Proposal for the purpose of restricting competition.
5. No relationship exists or will exist during the contract period between Respondent and the City or any other State City that interferes with fair competition or constitutes a conflict of interest.

Certification Regarding Debarment

I certify that, to the best of my knowledge, neither Respondent nor any of its principals: (a) are presently or have been debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by a Federal City or State City; (b) have within a three year period preceding this Proposal been convicted of or had a civil judgment rendered against them for commission of fraud, a criminal offense in connection with obtaining, attempting to obtain or performing a public (federal, state or local) transaction or contract under a public transaction, violation of antitrust statutes; commission of embezzlement, theft, forgery, falsification or destruction of records, making false

statements or receiving stolen property; (c) are presently indicted for or criminally or civilly charged by a government entity (federal, state or local) with the commission of any of the offenses enumerated in (b) of this certification; and (d) have not within a three year period preceding this Proposal had one or more public transactions (federal, state or local) terminated for cause.

This certification is a material representation of fact upon which the City has relied upon when this transaction was entered into. If it is later determined that Respondent knowingly rendered an erroneous certification, in addition to other remedies available, the City may pursue available remedies including suspension, debarment or termination of the contract.

Sincerely,

Signature

Name and Title of Authorized Representative Date

Attachment 2
Authorization to Release Information Letter
Alterations to this document are prohibited, see section 2.12.14.

[Date]

Consuella Barbour, Issuing Officer
8600 Glenarden Parkway
Glenarden, MD 20706

Dear Ms. Barbour:

[Name of Respondent] _____ (Respondent) hereby authorizes the City of Glenarden ("City") or a member of the Evaluation Committee to obtain information regarding its performance on other contracts, agreements or other business arrangements, its business reputation, and any other matter pertinent to evaluation and the selection of a successful Respondent in response to this RFP.

The Respondent acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The Respondent acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the State or may otherwise hurt its reputation or operations. The Respondent is willing to take that risk.

The Respondent hereby releases, acquits and forever discharges the City, their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to information, data, opinions and references obtained by the City or the Evaluation Committee in the evaluation and selection of a successful Respondent in response to the RFP.

The Respondent authorizes representatives of the City or the Evaluation Committee to contact any and all of the persons, entities and references which are, directly or indirectly, listed, submitted or referenced in the Respondent's Proposal submitted in response to RFP.

The Respondent further authorizes any and all persons and entities to provide information, data and opinions with regard to its performance under any contract, agreement or other business arrangement, its ability to perform, business reputation and any other matter pertinent to the evaluation of the Respondent's Proposal. The Respondent hereby releases, acquits and forever discharges any such person or entity and their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the Respondent that it may have or ever claim to have relating to information, data, opinions and references supplied to the City or the Evaluation Committee in the evaluation and selection of a successful Respondent in response to RFP.

A photocopy or facsimile of this signed Authorization is as valid as an original.

Sincerely,

Signature

Date

Name and Title of Authorized Representative

Date

Part 1 – No Confidential Information Provided

Confidential Treatment Is Not Requested and Respondent acknowledges that proposal response contains no confidential, secret, privileged or proprietary information. There is no request for confidential treatment of information contained in this proposal response.

This Form must be signed by the individual who signed the Respondent’s Proposal. The Respondent shall place this Form completed and signed in its Proposal.

- Fill in and sign the following if you have provided no confidential information. If signing this Part 1, do not complete Part 2.

Company RFP Title

Signature (required) Title Date

Part 2 - Confidential Treatment is Requested

The below information is to be completed and signed ONLY if Respondent is requesting confidential treatment of any information submitted in its Proposal.

NOTE:

- **Completion of this Form is the sole means of requesting confidential treatment.**
- **A RESPONDENT MAY NOT REQUEST PRICING INFORMATION IN PROPOSALS BE HELD IN CONFIDENCE.**

Completion of the Form and City's acceptance of Respondent's submission does not guarantee the City will grant Respondent's request for confidentiality. The City may reject Respondent's Proposal entirely in the event Respondent requests confidentiality and does not submit a fully completed Form or requests confidentiality for portions of its Proposal that are improper under the RFP.

This Form must be signed by the individual who signed the Respondent's Proposal. The Respondent shall place this Form completed and signed in its Proposal. A copy of this document shall be placed in all Proposals submitted including the Public Copy.

• If confidentiality is requested, failure to provide the information required on this Form may result in rejection of Respondent's submittal to request confidentiality or rejection of the Proposal as being nonresponsive.

• Please note that this Form is to be completed and signed only if you are submitting a request for confidential treatment of any information submitted in your Proposal. If signing this Part 2, do not complete Part 1.

Company

RFP Title

Signature (required)

Title

Date

**Attachment 4
Response Check List**

RFP REFERENCE SECTION	RESPONSE INCLUDED		LOCATION OF RESPONSE
	Yes	No	
One Electronic Copy of the Proposal			
One Electronic Public Copy with Confidential Information Excised (optional)			
Technical Proposal			
3.2.1 – Exhibit 1 – Transmittal Letter			
3.2.2 – Exhibit 2 – Table of Contents			
3.2.3 – Exhibit 3 – Executive Summary			
3.2.4 – Exhibit 4 – Respondent Background Information			
3.2.5 – Exhibit 5 – Personnel			
3.2.6 – Exhibit 6 – Termination, Litigation, Debarment			
3.2.7 – Exhibit 7 – Acceptance of Terms and Conditions			
3.2.8 – Exhibit 8 – Certification Letter (Attachment 1)			
3.2.9 – Exhibit 9 – Authorization to Release Information (Attachment 2)			
3.2.10 – Exhibit 10 – Firm Proposal Terms			
3.2.11 – Exhibit 11 – Addendums			
3.2.12 – Exhibit 12 – Request for Confidentiality (Attachment 3)			
4.1 – Exhibit 13 – Mandatory Specifications			
4.2 – Exhibit 14 – Scored Technical Specifications			
Exhibit 15 – Cost Proposal			

Attachment 5
Exceptions to Terms and Conditions

Proposed exceptions should be listed in this attachment of contractor’s proposal. Any proposed exceptions should be in a table similar to the one below:

Section #	Original Text Referenced	Proposed Language	Reason for Exception

Attachment 5
Evaluation Criteria and points for this RFP

A. Further breakdown of the evaluation criteria and points for this RFP include:

a. Total Possible Technical Scored Points – 1000

b. Total Possible Cost Points – 200

c. Total Possible Points Available – 1200

B. Minimum Technical Score Required – 600

C. Points by Section

RFP Section	Technical Criteria	Possible Technical Points
4.2.1	Course Content	350
4.2.2	Marketing	200
4.2.3	Evidence of Effectiveness	100
4.2.4	Experience	200
4.2.5	Reports	100
4.2.6	Optional Features	50
	Total Possible Technical Scored Points	1000
	Minimum respondent score required for Technical Scored Points	600

RFP Attachment	Cost Criteria	Possible Cost Points
Total Possible Cost Proposal Points	The number of points possible will be proportional to each respondent’s technical evaluation score.	200