



Request for Solicitation
No. Solicitation UB-24-SB-4
for
Student Assistance Program (SAP)

ISSUE DATE: December 1, 2023

ISSUING OFFICE:

UNIVERSITY OF BALTIMORE

Office of Procurement

1420 N. Charles Street, Baltimore, MD 21201

Stacey Brooks, Contract Specialist

Email: sbrooks@ubalt.edu

and

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The Issuing Office is the sole point of contact for this task order procurement.

NOTICE: Prospective Proposers who have received this document from a source other than the Issuing Office are advised to contact the Issuing Office. This is a courtesy. The University does not take responsibility if any Prospective Proposer is not informed of communication issued under this solicitation. It is the sole responsibility of any Prospective Proposer to visit the University's website for all documents relating to this solicitation. Visit: <http://www.ubalt.edu/about-ub/offices-and-services/procurement/information-for-merchants/current-ub-solicitations.cfm>

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SOLICITATION SCHEDULE

Issued Date:	December 1, 2023
Virtual Pre-Proposal Conference:	December 7, 2023, at 10:30 AM ET
Last Day for Questions:	December 14, 2023, at 10:00 AM ET
Responses to Questions by:	December 18, 2023 (to vendors)
Technical Proposal Due Date:	January 4, 2024, at 10:00 AM ET
Oral Presentation: (Short listed firms ONLY)	January 17-18, 2024
Financial Proposal Due Date: (Invited Firms ONLY)	January 25, 2024, at 10:00 AM ET
Contract Award Date (projected):	March 1, 2024
Contract Commencement Date (projected):	June 1, 2024

Note: Proposals are to be provided by the due date noted above. Proposals are to be submitted electronically to Issuing Office Contact(s) noted in this solicitation.

The University will be closed for Winter Break from December 21, 2023 - January 1, 2024 and for MLK Day, January 15, 2024. The Issuing Office will not be available to respond to inquiries regarding this Solicitation when the University is closed.

SECTION I.

GENERAL INFORMATION

1.1 OBJECTIVE

The University of Baltimore (UBalt) is soliciting proposals from qualified professional firms who specialize in providing online Student Assistance Program (SAP). The awarded firm shall provide enrolled University of Baltimore students counseling services that may include but not limited to: personal concerns, family issues, academic success and overall mental health. The University's administrators and faculty may refer students or the student may directly contact the SAP counselor/s.

The total number of eligible students will be determined by the fall and spring enrollment. The University will update the Contractor following a census taken at enrollment. Currently the University has an enrollment of 3,101 students.

The proposed SAP must have the following characteristics:

- Be available (24 hours a day, 365 days a year) to all University enrolled students – undergraduate, graduate and law students.
- Rates must be guaranteed for a minimum of two (2) years.

The work to be performed under this contract shall be provided by fully trained and experienced professionals with appropriate license(s) and shall consist of all necessary supervision, insurance, testing, labor, equipment and materials to perform a complete and acceptable job to the satisfaction of the University of Baltimore's representative. The University reserves the right to purchase items and services not specifically listed in this solicitation.

1.2 OVERVIEW OF THE UNIVERSITY OF BALTIMORE

Founded in 1925, The University of Baltimore is one of 12 institutions that comprise the University System of Maryland, the nation's 12th largest university system. The University of Baltimore offers career-focused graduate, doctoral and undergraduate programs and certificates in law, business, public affairs and the applied arts and sciences. Designed for working adults, UBalt academic programs are offered in flexible formats, including day, evening, weekend, in person, online and hybrid options. UBalt offers excellent teaching and a supportive community for graduate, professional and undergraduate students in an environment distinguished by outstanding student outcomes, academic research and public service, particularly in the Baltimore region. The University is organized into four schools/colleges, including the School of Law, the Merrick School of Business, the Yale Gordon College of Arts and Sciences and the College of Public Affairs.

In fall 2023, UBalt enrolled 3,101 students, including 1,809 graduate students (which includes our law school students) and 1,292 undergraduate students.

By design, UBalt serves a non-traditional population:

- The majority of UBalt students are enrolled in graduate programs. The University has approximately 2,507 commuter students of whom 47% are full-time and 53% are part-time.
- Nearly all our undergraduate students enroll at UBalt after completing credits elsewhere including those who have completed community college programs.
- The average age of our undergraduate students is 31.
- Our overall student population is 57% minority.
- The majority of our undergraduate students are first generation students and/or high financial need students as determined by the U.S. Department of Education.
- UBalt has been designated by the U.S. Department of Education as a Predominantly Black Institution (PBI), the only four-year university in Maryland with this designation and one of approximately 67 nationwide.
- Our campus is oriented toward the needs of our non-traditional, career-oriented students and therefore, does not provide residence halls, meal plans, intercollegiate athletics, fraternities or sororities.
- UBalt delivers instruction and services in a flexible environment with in-person, virtual/online and hybrid modalities to suit our older, non-traditional student populations. The University has a long tradition with the combination of in-person and online instruction. We were the first in the country to offer a fully online MBA program accredited by AACSB International.
- UBalt students are highly successful, as demonstrated by UBalt's ranking in the top 5 percent of master's universities in the nation for earning performance 10 years after entering college, according to Washington Monthly.

With nearly a century of success as the career-minded, city-focused institution for Baltimore and the region, the University is determined to build on its success. UBalt is well positioned for the changes underway in higher education. And we are committed to our continuing role as an anchor institution in Baltimore, contributing in meaningful ways to the surrounding community.

For more information about UBalt, visit <http://www.ubalt.edu>

1.3 ISSUING OFFICE

Stacey Brooks, Contract Specialist
University of Baltimore
Office of Procurement
1420 N. Charles Street, Baltimore, MD 21201
sbrooks@ubalt.edu

and

Blair Blankinship, Consultant
University of Baltimore
Office of Procurement
1420 N. Charles Street, Baltimore, MD 21201
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The Issuing Office shall be the sole point of contact with the University for purposes of the preparation and submittal of proposals in response to this solicitation.

1.4 QUESTIONS AND INQUIRIES

All questions and inquiries regarding this procurement must be directed to the individual(s) referenced above with the Issuing Office. Questions must be submitted in writing via the link provided below. Inquiries will receive a written reply/confirmation, submitted inquiries that are not confirmed by the University may not have been received. It is the sole responsibility of potential proposers to ensure inquiries/questions are received. Only written communications relative to the procurement shall be considered.

All questions will be answered in writing, in the form of an addendum to the solicitation. Both questions and answers will be distributed, without identification of the inquirer(s), to all prospective contractors who are on record with the Procurement Officer as having received this solicitation. No oral communications from the project team can be relied upon for proposal purposes.

Should a Proposer find discrepancies in the specifications or contract provisions included in this solicitation, or should there be doubt as to the meaning or intent of any section or subsection herein, the Proposer should request clarification from the Procurement Officer. Failure to request a clarification prior to the due date will be a waiver of any claim by the Proposer for expenses made necessary by reason of later interpretation of the contract documents; Proposers will be bound to the University's interpretation.

Potential proposers are advised that the University reserves the right to use its best judgment in choosing to respond or not to respond to any questions received before or after the above stated cut-off date for questions.

All such questions and inquiries must be received by the date provided in the solicitation or as updated via Addendum.

All Questions must be sent via a Word attachment to the following link: [RFP Questions](#)

1.5 REVISIONS OR AMENDMENTS TO THIS SOLICITATION

The University reserves the right to amend this solicitation at any time prior to the proposal due date. If it does become necessary to amend any part of this solicitation, the Procurement Officer will furnish an amendment or addendum to all prospective Proposers listed by the University as having received a copy of the solicitation. All amendments/addenda will be identified as such. If necessary, the proposal due date may be extended. Proposers are required to acknowledge the receipt of all amendments, addenda and clarifications issued. (Reference Appendix A, provided under a separate cover)

1.6 VIRTUAL PRE-PROPOSAL CONFERENCE

There will be a Virtual Pre-Proposal Conference held in conjunction with the solicitation. Attendance at the Pre-Proposal Conference is not mandatory.

The University will review the solicitation document during the first hour of the Pre-Proposal Conference.

If your firm is interested in attending the Virtual Pre-Proposal please click on the link provided to register by December 5, 2023 4:00 PM EDT, [Pre-Proposal Conference Registration](#)

While attendance at the Pre-Proposal Conference is not mandatory, information presented may be highly informative; therefore, all interested proposers are encouraged to attend in order to be able to better prepare acceptable proposals. A list of registered attendees will be shared via an Addendum. The Pre-Proposal conference will not be recorded and shall not be recorded by attendees.

The Pre-Proposal Conference date and time is subject to change. Proposers are advised to visit the University's Procurement website daily for the most updated information.

SPECIAL ACCESS: Any attendees requiring special assistance in attending the Pre-Proposal Conference, should contact the Issuing Office within 5 business days prior to the Pre-Proposal Conference date.

1.7 PRE-PROPOSAL MODIFICATION OR WITHDRAWAL OF OFFER

Proposals may be modified or withdrawn by written notice received at the Issuing Office before the proposal due date and time.

1.8 CLOSING DATE

Proposals must be submitted no later than January 4, 2024 at 10:00 AM EDT. Proposals in digital format, as well as transactions, and communication, in specified format, are permitted for this procurement. Proposals must be sent to the issuing office by the date and time noted in this solicitation or as amended via an addendum. Attachments must not be zipped or compressed. Proposals, amendments to proposals, or requests for withdrawal of proposals arriving after the closing time and date shall not be considered. The names of contractors will not be released until after award. At the University's sole discretion, the Solicitation Schedule may be modified.

1.9 NO PUBLIC OPENING OF PROPOSALS

A public opening of technical and price proposals will not be held.

1.10 PUBLIC INFORMATION ACT NOTICE

Contractors should give specific attention to the identification of those portions of their proposals that they deem to be confidential, proprietary information or trade secrets and provide any justification why such materials, upon request, should not be disclosed by the State under the Access to Public Records Act, State Government Article, Title 10, Subtitle 6, Annotated Code of Maryland.

Contractors must clearly identify each and every section that is deemed to be confidential, proprietary or a trade secret (it is NOT sufficient to preface your proposal with a statement that the entire content is proprietary, or to use a page header or footer that arbitrarily marks all pages as confidential). Any individual section of the proposal that is not labeled as confidential with an accompanying statement concerning the rationale for its claimed confidentiality shall be considered public information.

1.11 PROCUREMENT METHOD

This solicitation shall be conducted in accordance with the provisions of the University System of Maryland's (USM) Procurement Policies and Procedures. Specifically, the procurement method employed shall be Competitive Sealed Proposals.

1.12 ECONOMY OF PREPARATION

Each proposal should be prepared simply and economically, providing a straightforward, concise description of the contractor's offer and capabilities to satisfy the requirements of this solicitation. Emphasis should be on completeness and clarity of content.

1.13 CONTRACT TERM

The initial contract term will be on or about June 1, 2024 through May 30, 2026. The University reserves the right to renew the contract for up to three (3) additional, separately exercisable, 12-month periods, with the same contract terms and conditions at the pricing finalized at contract award.

1.14 PAYMENT SCHEDULE

Payments will be made monthly in arrears, on a net 30-day basis. The fee is to be inclusive of all travel costs. Payments are based on the total number of students (headcount based on census). The University of Baltimore will provide the vendor with current and updated student census twice per year (Fall and Spring). Payments must be adjusted accordingly.

1.15 CONTRACT ADMINISTRATION

A system for contract administration shall be maintained to ensure contractor conformance with the terms, conditions and specification of the contract and to ensure adequate and timely follow up.

1.16 CONFIDENTIALITY STATEMENT FOR CONTRACTORS

The successful Proposer will be required to sign the Confidentiality Statement for Contractors. See Appendix C (provided under a separate cover) for the contractual confidentiality obligations.

1.17 ACCEPTANCE OF TERMS AND CONDITIONS

By submitting a Proposal, a Proposer shall be deemed to have accepted the terms, conditions and requirements set forth in this solicitation. The solicitation including all addenda in total shall be incorporated into the Contract by reference. Any exceptions to the terms and conditions shall be submitted as specified in the Response Requirements section of this Solicitation. Contract exceptions not provided in the format required under this solicitation shall not be accepted nor be made part of any Contract, if awarded.

1.18 MINORITY BUSINESS ENTERPRISES (MBE)

An MBE goal is not required under this solicitation.

Minority participation is important to UBalt and the State of Maryland. State-certified Minority Business Enterprises (MBE) are strongly encouraged to respond to this solicitation notice. If not certified by the Maryland Department of Transportation (MDOT), MBEs are encouraged to initiate certification as soon as possible. For more information on the State's MBE program or questions related to certification, please contact MDOT's Office of Minority Business Enterprise/Equal Opportunity, telephone 800-544-6056 or view the MDOT website <http://www.mdot.state.md.us/mbe/index.html>.

1.19 TECHNICAL PROPOSAL/PRICE PROPOSAL SUBMISSION

The Technical Proposal and/or Price Proposal, either individually or collectively, is considered by UBalt to be an Offer.

1.20 ALTERNATE SOLUTION PROPOSALS

A proposer may not submit an alternate solution to the approach depicted in the solicitation.

1.21 MULTIPLE PROPOSALS

A proposer may only submit one proposal.

1.22 INDEMNIFICATION OF THE UNIVERSITY

The successful Contractor must agree to indemnify, defend, and hold the University of Baltimore, its employees and Regents harmless for any and all claims, damages, costs, fines and expenses that the University may incur as a result of, arising out of, or connected with decisions, actions, recommendations or referrals made by the Contractor's Therapeutic Counselors or any of Contractor's other employees. The Contractor must promptly inform the University of any claim, litigation, suit, or other action by a student, student's parent, or other third party.

END OF SECTION I

SECTION II.

SCOPE OF WORK/STATEMENT OF WORK

The Provider shall provide, to all currently registered University of Baltimore students, an online student assistance program (SAP). The services and providers shall assist students with problems that may include but not limited to; personal concerns, family issues, academic success and overall mental health. The student assistance program is provided as a resource to the student for self-referral and may also be utilized by university administrators and faculty for referrals.

The total number of eligible students will be determined by the fall and spring enrollment. The University will update the Contractor following a census taken at enrollment. Currently the University has an enrollment of 3,101 students.

The awarded SAP firm and program shall have:

- Be available (24 hours a day, 365 days a year) to all University students – undergraduate, graduate and law from their acceptance to the University.
- Rates must be guaranteed for a minimum of two (2) years.

2.1 BACKGROUND/STATISTICS

In the table below are Sessions Completed for Closed Self-Referral and/or Formal/Mandatory Cases. This data was taken from our current vendor. However, the data is subject to change during the life of the contract.

Sessions Completed for Closed Self-Referral and/or Formal/Mandatory Cases

6/1/22 - 5/31/23		6/1/21 - 5/31/22*		6/1/20 - 5/31/21*		6/1/19 - 5/31/20	
# Sessions	% Closed Cases	# Sessions	% Closed Cases	# Sessions	% Closed Cases	# Sessions	% Closed Cases
5	48%	5	51%	5	50%	5	45%
4	16%	4	9%	4	2%	4	4%
3	10%	3	10%	3	16%	3	18%
2	10%	2	13%	2	12%	2	20%
1	16%	1	16%	1	10%	1	14%
Average	3.69	Average	3.7	Average	4.08	Average	3.47

* The contract specifies up to five sessions per participant, per issue. For the year ending 5/31/22, 1% of closed cases utilized a 6th session. For the year ending 5/31/21, 4% utilized a 6th session, 4% a 7th session, and 2% an 8th session. These additional sessions were offered at vendor's choice.

All data shown from utilization reports of current SAP program, provided by vendor 6/1 of each year.

2.2 QUALIFICATIONS

The Contractor shall have the following qualifications during the life of the Contract. SAP counselors providing services to University students shall have a Master's Degree or higher in behavioral science from an accredited college or university. Upon the University's request the Contractor must provide a copy of SAP counselor's degrees, resumes and other appropriate certificates, licenses and credentials for at least three (3) individuals that are providing services. Student interns in training or professionals with less than one-year experience are excluded from performing work on this contract.

Qualifications of counselors – These individuals shall include master-level psychologists, doctoral-level psychologists, licensed/certified social workers, Advanced Clinical Practitioners, Licensed Professional Counselors (LPC's) and licensed attorneys (for legal counseling only). The exception to the Master's Degree requirement may be made for licensed, accredited or certified staff in fields where academic degrees are not awarded, but where it is standard for certificates or a license to be obtained through specialized knowledge, training and expertise obtained through professional training programs.

Only staff members who are Certified Licensed Substance Abuse Professionals shall provide counseling services to students suffering a problem related to substance abuse. Financial Consultants shall provide financial consultation only.

Counselors providing services shall be licensed or certified by the appropriate professional group and/or state-regulating agency and be experienced in a nationwide area in order to provide counseling and crisis assistance to students across the United States.

The Contractor must promptly notify the University of any change in staff providing services, as well as updated resumes of replacement staff.

Proposer shall be licensed to conduct business in the state of Maryland and provide a copy of such (Documentation from the State Department of Assessment and Taxation), upon request.

2.3 MANDATORY COVERED SERVICES AND PLAN COMPONENTS

Contractor counseling services shall include but are not limited to:

- 2.3.1 Intake: The SAP Provider shall provide telephone intake services for all students seeking assistance. This service must be available to all students on a 24/7/365 basis. The individual(s) handling intake should be licensed counseling professionals.
- 2.3.2 Short-term Therapeutic Counseling: The SAP Provider shall provide and direct counseling visits. All counseling shall be performed by the Contractor as certified SAP personnel and shall be supervised by the Contractor. The actual number of counseling sessions per student shall be determined by the Contractor and the individual student, based on need.
- 2.3.3 Range of Counseling Types: Counseling shall be provided for the full range of common short-term counseling needs, such as, but not limited to: family problems, marital issues, drug/alcohol

abuse and dependency, depression, anxiety, stress/tension, anger management, grief, child and adolescent problems, academic or work performance issues, gender identity, inter-personal problems, etc. Counseling should be available through multiple modes including, but not limited to, face-to-face, phone, video, instant messaging, etc. in locations that are appropriate to the needs of the student. This may be in the Baltimore, MD region and/or in other parts of the country.

Intake, assessment and referral for medical, financial and legal concerns shall be provided by the Contractor's certified SAP personnel with appropriate support counseling and referral to resolve any problems that are contributing to the problems at hand.

- 2.3.4 Referrals: The SAP Provider shall provide referral services for SAP students when judged by the Contractor to be warranted. All referrals shall be made by the Contractor certified SAP personnel to qualified providers.

All referrals for financial or legal counseling shall be made to third-party providers designated by the Contractor. The first consultation with the provider will be done at no charge to the student, but be the responsibility of the SAP Provider. Further legal or financial counseling/consultation costs will be the responsibility of the SAP student.

- 2.3.5 On-Line and Mobile Phone Services: The SAP Provider shall provide an on-line service, to include feature articles, publications, library, webcasts, podcasts, CD's and references to various topics related to health, family issues, academic success, etc.
- 2.3.6 Emergency Services: The SAP Provider shall provide emergency intervention, services, crisis stabilization and arrangement of emergency hospital admission on a 24-hour, face-to-face basis for any SAP student that may be of risk of harming themselves or others.
- 2.3.7 Confidentiality: All services shall be provided on a strictly confidential basis with reporting to the University in a manner that protects the identity of the SAP student except where the SAP student has provided express written consent to release information or except where life or safety is seriously threatened.

2.4 CONTRACTOR'S OTHER DUTIES AND REQUIREMENTS

Utilization Reports: The contractor shall provide quarterly and annual reports of utilization to the University which identifies the number of SAP students seeking assistance, their status within the University (undergraduate, graduate or law), the total number of counseling referrals and numbers of visits, the reasons for the visits, the number of referrals to other service providers and the reasons for those referrals. Where necessary outside the scope of monthly and annual reports, the contractor shall respond to inquiries from designated University staff contacts regarding usage and impact.

2.5 FUNDAMENTAL PROGRAM REQUIREMENTS

- 2.5.1 Program Promotion: The contractor shall provide monthly articles and notices for distribution to students to publicize and promote utilization of the SAP.

- 2.5.2 Provide full encompassing SAP program that includes the required counseling services.
- 2.5.3 Provide a SAP policy that the University should implement to support the services.
- 2.5.4 Provide within the policy a description of scope of services and limitations of the SAP program.
- 2.5.5 Provide samples of promotional materials for the University's approval. Disseminate the promotional materials as approved by the University.
- 2.5.6 The Contractor/ shall not exceed the University's established and approved waiting period for an appointment for following services:
- Scheduling of counseling appointments after intake Emergency Care.
- After hours/holiday care Financial Counseling Legal Counseling.
- 2.5.7 Contractor shall provide services for emergency cases outside normal business hours.
- 2.5.8 Contractor shall provide emergency physician care and emergency hospital admission during normal business hours and after normal business hours.
- 2.5.9 Contractor shall provide a telephone answering system that will handle additional call volume, should the call volume exceed that anticipated amount of call on any given day.
- 2.5.10 Contractor shall adhere to the procedures approved by the University regarding determining the eligibility for assistance.
- 2.5.11 Contractor shall adhere to all of the state and federal FERPA and HIPAA privacy laws. Contractor must also adhere to federal Title IX requirements for services provided to each student. For more information regarding the federal Title IX requirements please see link below:
- https://www2.ed.gov/about/offices/list/ocr/docs/tix_dis.html
- 2.5.12 The Contractor shall inform the University of any changes to the legal and financial counseling firms used during the life of the contract. This includes any sub-contracting firms for other counseling services provided under the contract.
- 2.5.13 Administrative Consulting: When requested, provide telephone and on-site consulting services to identified individuals within the University regarding concerns. Explain the process by which these services are provided and the cost structure for these services.
- 2.5.14 Utilization/Statistical Reports: The SAP Provider shall provide the University with appropriate follow-up and utilization/statistical reports on a quarterly and annual basis. Quarterly reports shall include cumulative year-to-date totals and shall be submitted no later than 30 calendar days following the end of the quarter for which the report is due. The data must maintain the confidentiality of individual students and shall include the following information, at minimum:
1. Age;
 2. Sex;

3. Race;
4. Status of Student- Undergraduate, graduate, law;
5. Type of Problem;
6. Number of Calls;
7. Number of Intakes/Assessments;
8. Number of Sessions/Visits;
9. Number of Sessions per Problem;
10. Number of Referrals;
11. Type of Referrals;
12. List of Referral Sources;
13. If referral, was a compliant/grievance made regarding service received?
14. Number of Students who are assessed and referred
15. SAP response time from initial student contact. Provide a sample of similar report.

2.6 OTHER/ADDITIONAL/OPTIONAL SERVICES – The University may request the following services:

2.6.1 The SAP provider will provide educational training sessions on specialized topics (such as: stress management, dealing with grief, etc.) The University will contact the SAP Provider to specify the program topic, length of session and on-site location.

- Training (remote)
- Brown Bag/On-Site Training
- Bilingual SAP Counselors
- Referral Services for Elder and Child Care
- Critical Incident Stress Debriefing (CISD)
- Data Collection
- Self-Evaluation and Quality Control
- Formal Operational Grievance Procedures
- Training on SAP Topics
- Limited Diagnostic Evaluations for uninsured or underinsured students
- Forensic Psychiatrist for threat evaluation
- Telemedicine

END OF SECTION II

SECTION III.

Article 1. SUBMISSION AND TECHNICAL PROPOSAL RESPONSE REQUIREMENTS

1.1. SUBMISSION

Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. Submit Proposals using the following Team Dynamix link [Proposal Submission](#).

Proposal documents are to be submitted as an attachment in PDF format (no zipped files). Hyperlinks to software products sent to the Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive if contract terms and conditions (i.e., a Click-Through Agreement) are required to be accepted by the University in order to download the Proposal. By providing the Proposal to the University electronically, the Proposer grants the University the unlimited right to generate additional electronic and/or paper copies for distribution for the purposes of review, evaluation and archive.

The University may deem a submission non-responsive if received after the due date and time. The date and time of the submission is time stamped by the Team Dynamix link portal and shall be the official date and time of submission to Procurement.

Financial Proposals shall not be included with Technical Proposals. ONLY shortlisted firms shall be invited to submit a Financial Proposal.

Proposers are to:

SUBMIT ONE PDF TITLED: "FIRM NAME_ TECHNICAL PROPOSAL"

1.2 INITIAL TECHNICAL CRITERIA

Clear, concise, yet detailed responses to the technical criteria below are to be provided in the Technical Proposal. In addition, the Bid/Proposal Affidavit and Acknowledgement of Receipt of Addenda (if applicable) must be included. Standard sales material may be provided, but must be attached as an appendix rather than included within the body of the Proposal.

Proposers must organize their proposal in the same order as the requirements listed in the solicitation. Each requirement must be addressed in the proposal, and that response should be enumerated with the same section numbers listed in the Solicitation Requirement.

The following information must be furnished in the Technical Proposal per this solicitation. Failure to include any of the items listed below may disqualify your firm's response. Proposers are requested to compile their Proposals in the same order. It is the Proposer's responsibility to tailor its response to demonstrate its qualifications to perform the scope of work specifically for the University of Baltimore.

1.2.1 TECHNICAL RESPONSE REQUIREMENTS

Proposals that concisely present the information requested in the order and manner requested will be considered more favorably than a Proposal from a Proposer of commensurate qualifications that displays a lack of organization, conciseness, or attention to detail.

Offerors/Proposers **MUST** meet the following qualifications. Failure to meet the qualifications will result in Offeror being deemed not reasonably susceptible of being selected for award.

- A minimum of three (3) years of experience operating and administering student and/or employee assistance services including but not limited to; academic concerns, psychological/emotional problems and family issues in a university setting.

The Proposal should be divided and organized by clearly defined “Tabs” (sections) referencing the sections/response requirements provided below:

1.2.2 Section 1: Transmittal Letter. A transmittal letter on the Firm’s business stationery referencing the proposal title and number. The transmittal letter shall be signed by an individual who is authorized to bind the firm to all statements, including services and financial statements, contained in the Proposal, must accompany the Technical Proposal. The letter should be an executive summary that clearly and concisely summarizes the content of the Technical Proposal. Include the Proposer’s official business address and state in which it is incorporated or organized (if Proposer is not an individual). **An appropriate contact name, title, phone number, and email address should also be provided for use by the University during the procurement process.** Do not include price information in the transmittal letter.

Signing of Forms: A Proposal, if submitted by an individual, shall be signed by the individual. If submitted by a partnership, a Proposal shall be signed by such member(s) of the partnership with authority to bind the partnership. If submitted by a corporation, a Proposal shall be signed by an officer, and attested by the corporate secretary or an assistant corporate secretary; if not signed by an officer, there must be attached a copy of a board resolution or that portion of the by-laws, duly certified by the corporate secretary, showing the authority of the person so signing on behalf of the corporation.

1.2.3 Section 2: Table of Contents

Include a Table of Contents displaying the organization of the proposal being submitted.

1.2.4 Section 3: Company/Firm Profile (Attachment A)

Proposers shall have a minimum of three (3) years of experience operating and administering student and/or employee assistance services including but not limited to, academic concerns, psychological/emotional problems and family issues in a university setting.

In Offeror’s proposal response, Offeror shall provide documentation to demonstrate a history of program stability. Describe as specifically as possible your history and experience in providing SAP services to clients in a university setting.

The Proposer shall include in their Section 3 submission:

1. Complete the **Company Profile Form (Attachment A)**
2. The proposer shall submit a general company profile of each firm on its team. Information provided should include, but not be limited to: number of years in business, principals of the firm and number of employees (and their roles), etc.
3. Organizational Chart: An organizational chart of the Proposer's team is to be submitted.

1.2.5 Section 4: Past Services Experience (Attachment B)

Provide a comprehensive narrative indicating how your firm would provide SAP Services as outlined in this solicitation, demonstrating the Proposer's management, organization and resources which will be provided to the University.

By completing Attachment B, Contractor Experience and Reference Form, list and individually describe three (3) recent (within the last 5 years) SAP programs that best illustrate the firm's qualifications and are similar to UBalt's needs. Proposers should include SAP Programs where the key individuals who were directly responsible for and directly assigned to the current SAP Programs are also assigned to UBalt's SAP program. Proposers shall provide current programs of similar size and scope to this solicitation that have been or is currently successfully managed.

Provide the following information:

1. Client name, address, point of contact, phone number and email address (The point of contact should be a person who was directly responsible for the program); **(This information may be used for client references); term of contract, value of contract and key personnel assigned to manage the SAP program.**
2. By completing page two of Attachment B, Proposers shall provide references for all clients where services have been **terminated** in the past twelve (12) months indicating the Name of the contract, Contact name, address, phone number and email address. Indicate the contract term and contract value.

Note: The University may contact at any time during the procurement process known clients of the Proposer to obtain additional information/references regarding the Proposer's SAP services or Key Personnel.

1.2.6 Section 5: Key Personnel and Project Team (Attachment C)

Complete Attachment C, Key Personnel Form, include three (3) Key Personnel Form for each key personnel.

Provide within the Key Personnel Form each person assigned to manage UBalt's SAP Program. Proposer must include the SAP counselor's degrees and other appropriate certificates, licenses and credentials for at least three (3) individuals that will be working on this contract. Student interns in training or professionals with less than one-year experience is excluded from performing work on this contract.

The proposing firm is not to provide Attachment C of all employees, but rather those people who will be intimately involved with the project. Specifically, the proposer is to submit resumes of those individuals with whom the University would be directly working should the proposer be selected for contract award.

Personnel Commitment: By submitting the names of these key personnel for consideration, the Proposer is committing these people to the University for the Program's duration if awarded the contract. No personnel changes will be permitted without written authorization from the University prior to such changes or assignments occurring via a contract modification issued by the Procurement Officer.

In the event that circumstances necessitate to add or substitute staff for any of the key personnel positions designated, the individual(s) proposed must demonstrate similar qualifications, experience and documentation as required in this solicitation to successfully perform such duties and sufficient information to demonstrate that the proposed individual(s) meets or exceeds the qualifications of the Key Personnel to be replaced. The Procurement Officer shall have the sole right to determine whether key personnel proposed as substitutes qualify.

1.2.7 STANDARD AND REQUIRED SAP SERVICES (Attachment D)

1.2.7.1 Section 7: Proposer shall complete the Services Questionnaire, see Attachment D. The Services Questionnaire comprises of service item the University requires (first tab) and optional/additional services (second tab) the University may desire and utilize.

Complete the Questionnaire by selecting (1) "yes" or "no" (as applicable) if your firm provides the services and (2) provide additional information/details regarding each service your plan does or does not offer. If your firm requires more space to respond to a question/questionnaire service item, your firm may add additional space/page(s) following that question as additional pages. Ensure your firm numbers the additional pages the same number as the Question/Questionnaire service item. Your firm's submission and response/s must be submitted in the same numerical format as provided.

DO NOT include pricing in the Questionnaire.

1.2.8 Section 6: Other Requirements and Forms

- **Acknowledgement of Receipt of Addenda Form (see Appendix A).**

If any addenda to the Solicitation documents are issued prior to the due date and time for Proposals, this form must be completed, signed, and included in the Proposer's Technical Proposal.

- **Bid Proposal Affidavit (see Appendix A).**

Complete and sign the Proposal Affidavit and enclose with the Technical Proposal.

- **Conflict of Interest Affidavit and Disclosure (see Appendix A).**
- **Insurance.**

Provide a copy of a Certificate of Insurance verifying your firm's Coverage for Professional Liability, Commercial General Liability, Workmen's Compensation, Automobile Liability Insurance and Professional Liability.

- **Acknowledgement of Review of Contract Statement.**

The University Contract for this Procurement will contain the provisions in Appendix C as well as any additional terms required by the University. By submitting a Proposal, the Proposer warrants that they

have reviewed Appendix C and will execute a contract: a) in substantially the same form; and b) with these terms and conditions. The University will issue a purchase order in its financial system for accounting purposes only.

Proposers are to include a statement that the University's Contract terms and condition were reviewed and accepted.

Any exceptions to the Contract or terms and conditions are to be addressed and provided in this section of the Proposer's proposal/submission.

END OF TECHNICAL RESPONSE REQUIREMENTS

SECTION III.

Article 2. FINANCIAL PROPOSAL RESPONSE REQUIREMENTS

ONLY INVITED FIRMS

2.0 FINANCIAL/PRICE PROPOSAL

2.1 Submission

Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. Submit Proposals using the following Team Dynamix link [Proposal Submission](#).

Proposal documents are to be submitted as an attachment in PDF format (no zipped files). Hyperlinks to software products sent to the Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive if contract terms and conditions (i.e., a Click-Through Agreement) are required to be accepted by the University in order to download the Proposal. By providing the Proposal to the University electronically, the Proposer grants the University the unlimited right to generate additional electronic and/or paper copies for distribution for the purposes of review, evaluation and archive.

The University may deem a submission non-responsive if received after the due date and time. The date and time of the submission is time stamped by the Team Dynamix link portal and shall be the official date and time of submission to Procurement.

Proposers are to:

SUBMIT ONE PDF TITLED: "FIRM NAME_FINANCIAL PROPOSAL"

2.2 Financial/Price Proposals. See Attachment E for the Pricing Form

Proposers must complete and submit the Price Proposal Statement Form included in Attachment E.

Contractor pricing should be included modeling for a maximum of 5 and 8 counseling sessions per issue. The University will select a number of counseling sessions per issue, 5 or 8 for which the SAP Provider will be responsible for providing at no cost to the student. If a student is requiring additional sessions outside of the contracted amount of sessions (5 or 8), it will be the sole responsibility of the student.

Proposers shall not include any pricing in the Technical Proposal.

Pricing shall be fixed for the first two years.

Thereafter, it will be the responsibility of the contractor to request a price increase, if any, within 120 days of the end of each contract year. Any price increase not received by that time, may not be considered and pricing in the subsequent year will remain as stated during the just completed contract term. A price increase, if any shall not exceed the Consumer Price Index ("CPI") for "All Urban Consumers" as published by the US Department of Labor Statistics. For purposes of calculating the potential increase, the CPI to be used will be for February of the current year. For example, for October 31, 2026, the price index for February 2026 will be used. Statistics will be referenced as a **cap** for

negotiable purposes only, however, increases shall not exceed 5%. Contractor is not to assume that any price increase will be applied to yearly renewals. As well, increases are not cumulative for prior years; if a contractor fails to request a price increase in one year and then requests an increase for the subsequent year, the contractor cannot include a cumulative amount which includes the prior annual term. Any increase approved by the University will take effect on the start of each contract year.

END OF SECTION III.

Article 2. FINANCIAL PROPOSAL RESPONSE REQUIREMENTS

SECTION III

EVALUATION PROCESS

Article 3 INITIAL TECHNICAL EVALUATION AND SELECTION PROCESS

3.1 Evaluation Committee

All Proposals received by the closing deadline will be evaluated. The Procurement Officer shall establish an Evaluation Committee to review and rate the proposals. The Committee may request additional technical assistance from any source within the State.

3.2 Classification of Proposals

The Procurement Officer shall review each proposal for compliance with all necessary specifications and requirements of this solicitation. Failure to comply with any specification or requirement will normally disqualify a firm's proposal. The term, "qualified firm" includes only those responsible firms that submitted proposals initially classified by the Procurement Officer as reasonably susceptible of being selected for award. The term does not include those firms that submitted proposals not reasonably susceptible of being selected for award or that are not deemed responsible.

The Procurement Officer shall have the sole authority to determine whether any deviation from the requirements of this solicitation is substantial in nature. The Procurement Officer may waive or permit to be cured minor irregularities in a proposal, which are immaterial or inconsequential in nature whenever it is determined to be in the University's best interest.

3.3 Evaluation and Recommendation

The evaluation shall be based on the evaluation factors set forth in the solicitation. Technical proposals and Financial Proposals shall be evaluated independently of each other. Firms are advised that for purposes of evaluation, technical merit is of greater importance than financial merit. Based on its evaluation of the technical and financial proposals, the Evaluation Committee will make a recommendation to the Procurement Officer for the award of the contract to the responsible offeror whose proposal is determined to be the most advantageous to the University, considering both technical and financial factors as set forth in the solicitation.

3.4 Technical Evaluation Criteria

The evaluation of proposals will be made from the criteria as listed below. The criteria for the proposal evaluation are listed below in descending order of importance. Please see Section III, Article I for Submission of Information required in firm's proposals. Technical considerations are of greater importance than the financial considerations.

1. Relevant Past Experience with successful development in Higher Education. Firms are required to meet the minimum qualifications.
2. The ability, extent and quality the firm can provide the required and additional services set forth in the RFP and Questionnaire.

3. Relevant Qualifications and Experience of Key Personnel and the Project Team.
4. Company Profile and Experience.
5. Other Services.

3.5 Shortlisting

In accordance with the Evaluation Criteria, a shortlist may be developed based on the initial written technical proposals. All Proposers will be notified of the results as they pertain to their respective Technical Proposal.

3.6 Interviews/Oral Presentations/Discussion Sessions

3.6.1 Purpose

Based on the Evaluation Committee's Initial Technical Evaluation, the University may invite, without cost to itself, the shortlisted Proposers to an oral presentation/discussion session ("Discussion Session/Oral Presentations").

The purposes of the sessions are as follows:

- (i) To provide the Proposer the opportunity to demonstrate/discuss their services;
- (ii) To discuss/clarify any and all aspects of the Technical Proposal, in particular the proposed Services/product, options, approach/methodologies, implementation process, schedule, staffing of the contract, and ongoing support and other applicable professional services;
- (iii) To allow the University to meet the Proposer's key personnel, technicians and for these personnel to convey directly their experience and expertise in the proposed services/product and its implementation; and
- (iv) To provide an opportunity to clarify the scope of services for the intended contract and discuss any items addressed in the Technical Proposal that may require additional clarification.
- (v) If applicable, review the Price Proposal structure.

3.6.2 Format

The Oral Presentations will be informal, as the University is not interested in a sales presentation by executives and business development staff; rather, the University is requesting evidence of the Proposer's ability to meet the University's requirements and an interactive discussion with each of the shortlisted Proposers. It is important that those key personnel who are proposed to be assigned to the University fully participate in the presentation and discussion. Ample time will be available for the University and the Proposer to ask questions and discuss issues and concerns related to the product, the scope of the services, and the Proposer's capabilities and qualifications. We anticipate that the Discussion Session will be approximately 60-90 minutes in length, to be determined at a later date.

3.6.3 Date

Times and dates for the Oral Presentations, if any, will be set upon completion of the Initial Technical Evaluation. UBalt reserves the right to hold additional discussion or scope review interviews, if deemed necessary to evaluate a firm's qualifications and proposal.

3.7 Second Phase Technical Evaluation

3.7.1 Criteria

Following the Oral Discussion Session held with shortlisted Proposers (if such sessions were held), a Second Phase Technical Evaluation will be conducted. The Evaluation Committee will re-evaluate all criteria of the Technical Proposals of shortlisted Proposers, incorporating assessments of the Oral Discussion Session and outcomes of reference checks, if performed. The University reserves the right to make a determination that a Proposer is not shortlisted prior to completing reference checks.

3.7.2 Process

Further shortlists may result as the procurement progresses. At each phase of the process, those firms that do not remain shortlisted will not progress in the procurement. All Proposers will be notified of the results of the Evaluation as they pertain to their respective Proposals.

At the sole discretion of UBalt, Proposers who have submitted Technical Proposals evaluated by UBalt to be viable and of further interest (i.e. "shortlisted") may be requested to provide UBalt additional technical information to further clarify the Contractor's technical qualifications. If additional information is requested of one or more Proposers, the Procurement Officer will so advise.

Once a final shortlist of proposals is established, the University will rank the technical proposals from highest to lowest.

The University may perform separate evaluation ratings and combine the evaluations as each phase is completed, or combine all ratings for each phase to determine the final ranking.

The University may incorporate references prior to or after establishing the final shortlist of proposals. However, the University reserves the right to modify scoring if pertinent information regarding a Proposer's capability is obtained prior to an award. Once a final shortlist of proposals is established, the Committee will rank the remaining Proposals from highest to lowest.

Those Contractors that are not shortlisted will not progress in the procurement. Multiple shortlists may result as the procurement progresses.

SECTION III

ARTICLE 4 PRICE PROPOSALS AND FINAL EVALUATION PROCESS

4.1 Price Evaluation

Price Proposals will not be opened publicly. Price Proposals will be evaluated based on the full cost of the SAP services.

The University will establish a financial ranking of the proposals from lowest to highest total offers or best to lowest offers.

Proposals cannot be modified, supplemented, or changed in any way after the due date and time for proposals, unless specifically requested by the University. The University may elect to request Best & Final Price Proposal(s).

Discussions

The University reserves the right to recommend an Offeror for contract award based upon the Offeror's technical proposal and price proposal without further discussion. However, should the Committee find that further discussion would benefit the University and the State, the Committee shall recommend such discussions to the Procurement Officer. Should the Procurement Officer determine that further discussion would be in the best interest of the University and the State, the Procurement Officer shall establish procedures and schedules for conducting discussions and will notify responsible Proposers.

4.2 Best and Final Offers

When in the best interest of the University and the State, the Committee may recommend and the Procurement Officer may permit qualified Offerors to revise their proposals by submitting "Best and Final" offers.

4.3 Final Ranking and Selection

Following evaluation of the technical proposals and the price proposals, the Evaluation and Selection Committee will make an initial overall ranking of the proposals and recommend to the Procurement Officer the award of the contract to the responsible Offeror whose proposal is determined to be the most advantageous to the University and the State of Maryland based on the results of the final technical and financial evaluation in accordance with the University System of Maryland Procurement Policies and Procedures. Technical merit will have a greater weight than financial in the final ranking.

Award may be made to the proposal with a higher technical ranking even if its cost proposal is not the lowest. The decision of the award of the contract will be made at the discretion of the Procurement Officer and will depend on the facts and circumstances of the procurement. The Procurement Officer retains the discretion to examine all factors to determine the award of the contract. The goal is to contract with the Contractor that provides the best overall value to the University.

The University may select one or more Contractors to further engage in negotiations, including terms of a contract and other issues to be incorporated into the contract. The University reserves the right to make an award with or without negotiations.

4.4 Negotiations

The University may select for award one or more Proposer(s) to negotiate the terms and conditions of the Contract. The University reserves the right to make an award with or without negotiation. In the event negotiations between the selected contractor and the University fail to mutually agree on any terms and conditions, the University may rescind the award and conduct negotiations with the 2nd highest ranked firm/contractor. Additionally, if the Contractor fails to actively pursue the finalization and execution of the Contract, the University may rescind the Contract, at any time prior to the full execution of the Contract.

END OF SECTION III

ARTICLE 4 PRICE PROPOSALS AND FINAL EVALUATION PROCESS