



STATE OF MARYLAND

Community Health Resources Commission

45 Calvert Street, Room 336, Annapolis, MD 21401

Wes Moore, Governor; Aruna Miller, Lt. Governor;
Destiny-Simone Ramjohn, PhD, Chair; Mark Luckner, Executive Director

April 10, 2026

Maryland Department of Health Maryland Community Health Resources Commission

Request for Proposals for Fiscal Review of Grant Applicant Financial Documents

BPM: 0562425

1. Summary Statement and Background:

- a. The Maryland Community Health Resources Commission (CHRC; the Commission), an independent agency operating within the Maryland Department of Health, is seeking to hire independent reviewers (the “Contractor”) to evaluate the financial strength of grant applicants received under the CHRC’s Fiscal Year 2026 Request for Applications.
- b. The selected Contractor will review documents submitted on behalf of approximately 100 applicant organizations that include but are not limited to:
 - a. Legal and Financial disclosures;
 - b. Certificates of Good Standing;
 - c. Charitable Organization Registration and Organization Annual Report;
 - d. State Board of Elections Registration Statement and recent Statement of Contributions;
 - e. Tax returns; and/or
 - f. Audited Financial Statements or unaudited financial statements
- c. The Contractor will be required to submit their evaluations of the documents listed above to the Commission on or before May 14, 2026.
- d. The Contractor cannot be affiliated or connected with a Commission grantee or an entity applying for the [Commission grants](#), either in a direct employment, contractual agreement, or consulting role. A Conflict-of-Interest Affidavit and Disclosure statement (Attachment A) and Confidentiality Agreement will be required of the selected contractors.

2. Minimum Requirements:

A. Qualifications of Contractor:

- i. Contractor will have a demonstrated ability to provide concise and thorough evaluation of the financial stability and sustainability of each assigned applicant organization;
- ii. Practical experience in the examination of financial statements and/or tax returns of non/for-profit entities, health care entities, (including but not limited to FQHCs, provider organizations or crisis stabilization centers) and/or community-based behavioral health care providers.

B. Preferred Experience:

- i. Contractor must have at least a minimum five years' experience as a CPA;
- ii. Practical experience in performing economic and policy analysis services with an emphasis on safety-net healthcare providers in Maryland (including but not limited to FQHCs, provider organizations, or crisis stabilization centers), and/or community-based behavioral health care providers.

3. Procurement Officer:

Jen Clatterbuck, Administrator
Maryland Community Health Resources Commission
45 Calvert Street, Room 336
Annapolis, MD 21401
Phone: 410.260.6086
Email: jen.clatterbuck@maryland.gov

4. Deliverables

- a. The following deliverables are due to CHRC staff no later than May 14, 2026, by 12:00 pm (noon) EDT:
 - i. An individual applications scoring sheet for each proposal reviewed via Smartsheet (scoring rubric will be provided by CHRC).
 - ii. Concise assessment of the financial strengths and weaknesses of applicant organization and its proposals and questions for each applicant to address via Smartsheet
 - iii. Review and comment on each of the following:
 - a. Legal and Financial disclosures;
 - b. Certificates of Good Standing;
 - c. Charitable Organization Registration and Organization Annual Report;
 - d. State Board of Elections Registration Statement and recent of Statement of Contributions
 - iv. The Contractor will be required to attend individual meetings with CHRC staff, the Review Committee, and the full Commission. The meetings will occur in Annapolis to discuss the proposals reviewed (minimum 15 hours) and will occur during May and June 2026 at dates to be determined.

5. Contract term

The term of the Contract is from April 24, 2026 – June 30, 2026.

6. Procurement method

The Contract to be awarded will result from a [Small Procurement III](#) (\$50,001 - \$100,000).

7. Bid/Proposal submission information

- A. Submits bids/proposals **via email** to Jen Clatterbuck, CHRC Procurement Officer at jen.clatterbuck@maryland.gov no later than **12:00 pm EDT by April 17, 2026**.

Submission Documents:

1. Proposals containing the following:

- a. Name, organization and contact information (mailing address, telephone, email);
 - b. Current copy of resume or CV of the party working on the project;
 - c. References, diplomas and/or certificates
2. Statement illustrating the Contractor's knowledge of and practical experience in the examination of financial statements and tax returns, and the ability to evaluate the financial stability and sustainability of an organization.
3. Total Compensation for the bid/proposal to be calculated as follows:
 - a. Unit cost for the review of one set of financials documents, as noted in Section 1b. Contractor should assume no more than three (3) professional hours per review
 - b. Pass-through costs will be limited to meeting attendance (mileage and hourly attendance for lead reviewer) and postage.
 - c. The total cost of the project, not to exceed the dollar amount outlined in Section 6 of this Solicitation.

B. Inquiries Statement:

Inquires may be sent via email to Jen Clatterbuck, Procurement Officer via email:
jen.clatterbuck@maryland.gov

8. Award Determination

- i. Most Advantageous Offer ("Most advantageous" is defined in COMAR 21.01.02.01.B (56) and requires consideration of both price and evaluation criteria);
- ii. The Most Advantageous Offer will be determined based upon each Offeror's price plus the following technical evaluation factors (Technical Evaluation Criteria):
- iii. Technical Evaluation Criteria:
 1. Familiarity with the work and mission of the Commission;
 2. Contractor will have a demonstrated knowledge of and practical experience in providing concise and thorough examination and evaluation of an organization's financial stability and sustainability; and
 3. Demonstrated knowledge of and practical experience in the examination of financial statements and tax returns of non/for-profit organizations.

9. Payment

A. Invoices should be submitted to via email to:

Maryland Community Health Resources Commission
45 Calvert Street, Room 336
Annapolis, MD 21401
Email: jen.clatterbuck@maryland.gov

B. Invoice shall be submitted upon completion of all deliverables and possible participation in the meetings, as described in Section 4 above. Invoices shall be submitted following the completion of the Review Committee work.

C. Amount invoiced must not exceed the price quoted by the Contractor on the price form, unless a Contract Modification has been agreed upon by both parties,

memorialized and executed.

- D.** The invoice shall include the Contractor's name and address as identified on Federal Form W9 as well as a unique invoice number, the Federal tax ID number for the Contractor, and the address of the Maryland Community Health Resources Commission – 45 Calvert Street, Room 336, Annapolis, MD 21401.

10. The Commission agrees to provide guidance concerning contract activities, evaluation of review activities and the acceptance of final deliverables.

11. MBE, Small Business Reserve, Veterans', Requirements

- There is no MBE subcontractor participation goal for this procurement.
- There is no VSBE participation goal for this procurement.
- This solicitation is as a Small Business Reserve (SBR) Procurement.

12. The Price Proposal Form is included as Attachment B.

13. The standard Small Procurement Contract is included as Attachment C.

CONFLICT OF INTEREST AFFIDAVIT AND DISCLOSURE

Note: To be completed upon selection/hire

CONFLICT OF INTEREST AFFIDAVIT AND DISCLOSURE

A. "Conflict of interest" means that because of other activities or relationships with other persons, a person is unable or potentially unable to render impartial assistance or advice to the State, or the person's objectivity in performing the contract work is or might be otherwise impaired, or a person has an unfair competitive advantage.

B. "Person" has the meaning stated in COMAR 21.01.02.01B(64) and includes a Bidder/Offeror, Contractor, consultant, or subcontractor or sub-consultant at any tier, and also includes an employee or agent of any of them if the employee or agent has or will have the authority to control or supervise all or a portion of the work for which a Bid/Proposal is made.

C. The Bidder/Offeror warrants that, except as disclosed in §D, below, there are no relevant facts or circumstances now giving rise or which could, in the future, give rise to a conflict of interest.

D. The following facts or circumstances give rise or could in the future give rise to a conflict of interest (explain in detail—attach additional sheets if necessary):

E. The Bidder/Offeror agrees that if an actual or potential conflict of interest arises after the date of this affidavit, the Bidder/Offeror shall immediately make a full disclosure in writing to the procurement officer of all relevant facts and circumstances. This disclosure shall include a description of actions which the Bidder/Offeror has taken and proposes to take to avoid, mitigate, or neutralize the actual or potential conflict of interest. If the contract has been awarded and performance of the contract has begun, the Contractor shall continue performance until notified by the procurement officer of any contrary action to be taken.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Date: _____ By: _____
(Authorized Representative and Affiant)

ATTACHMENT B
PRICE PROPOSAL FORM

Fiscal Review of Grant Applicant Financial Documents

Note: To accompany your bid submission

Company/Vendor Name: _____

Federal Tax Identification Number or Social Security Number: _____

Company/Vendor Address: _____

Telephone Number: _____ Mobile Number: _____

Email Address: _____

Unit cost of one set of Financial documents (not to exceed 3 professional hours)	\$
Pass-through costs (Mileage, Meeting attendance, parking, postage)	\$
Total Project Cost	\$

Authorized Signature: _____ Date: _____

Printed Name: _____

ATTACHMENT C

SAMPLE SMALL PROCUREMENT CONTRACT – FOR REVIEW PURPOSES ONLY

NOTE: To be completed upon selection/hire

THIS CONTRACT (the "Contract"), is made as of the _____ day of _____, 20____ by and between the STATE OF MARYLAND, acting through the DEPARTMENT OF HEALTH ("Department"), and

("Contractor") whose principal office in Maryland is

and whose principal business address is

The parties agree as follows:

1. Scope of Contract.

(a) The Contractor shall provide the following goods or services:

The scope of work or solicitation dated _____ is attached and incorporated by reference as Exhibit _____. The Contractor's bid or proposal dated _____ is attached and incorporated by references as Exhibit _____. If there is any conflict between this Contract and any exhibits incorporated by reference, the terms of this contract shall govern. If there is any conflict among the Exhibits, the following order of precedence shall determine the prevailing provision:

Exhibit A – the scope of work or solicitation and Exhibit B – the Contractor's bid or proposal.

(b) **Changes.** This Contract may be amended only with the written consent of both parties. Amendments may not change significantly the scope of the Contract (including the Contract price).

2. Term of Contract. The term of this Contract shall be for the period of _____, 20____ through _____, 20____.

3. Compensation and Method of Payment.

- (a) **Compensation.** The total compensation for services to be rendered by the Contractor shall not exceed \$_____.
- (b) **Method of Payment.** The Department shall pay the Contractor no later than thirty (30) days after the Department receives a proper invoice from the Contractor. Charges for late payment of invoices, other than as prescribed by Title 15, Subtitle 1, State Finance and Procurement Article, Maryland Code, are prohibited.
- (c) **Tax Identification Number.** The Contractor's Federal Tax Identification Number is _____ . The Contractor's Social Security Number is _____ (Individual Contractor Only). Contractor's Federal Tax Identification Number (or Social Security Number - Individual Contractor Only) shall appear on all invoices submitted by the Contractor to the Department for payment.

- (d) **Invoicing.** All invoices for services shall be signed by the Contractor and submitted to the Procurement Officer. All invoices shall be submitted in triplicate no later than the 15th of the month for the preceding calendar month. All invoices shall include the following information:
 - Contractor name;
 - Remittance address;
 - Federal taxpayer identification number (or if sole proprietorship, the individual's social security number);
 - Invoice period;
 - Invoice date;
 - Invoice number
 - State assigned Contract number;
 - State assigned (Blanket) Purchase Order number(s);
 - Goods or services provided; and
 - Amount due.
 Invoices submitted without the required information cannot be processed for payment until the Contractor provides the required information.

4. **Procurement Officer.** The Department designates _____ to serve as Procurement Officer for this Contract. All contact between the Department and the Contractor regarding all matters relative to this Contract shall be coordinated through the Procurement Officer.

5. **Disputes.** Disputes arising under this Contract shall be governed by State Finance and Procurement Article, Title 15, Subtitle 2, Part III, Annotated Code of Maryland, and by COMAR 21.10 Administrative and Civil Remedies. Pending resolution of a dispute, the Contractor shall continue to perform this Contract, as directed by the Procurement Officer.

6. **Termination for Convenience.** The State may terminate this Contract, in whole or in part, without showing cause upon prior written notification to the Contractor specifying the extent and the effective date of the termination. The State will pay all reasonable costs associated with this Contract that the Contractor has incurred up to the date of termination, and all reasonable costs associated with termination of the Contract. However, the Contractor may not be reimbursed for any anticipatory profits which have not been earned up to the date of termination. Termination hereunder, including the determination of the rights and obligations of the parties, shall be governed by the provisions of COMAR 21.07.01.12(A)(2).

7. **Termination for Default.** If the Contractor does not fulfill obligations under this Contract or violates any provision of this Contract, the Department may terminate the Contract by giving the Contractor written notice of termination. Termination under this paragraph does not relieve the Contractor from

liability for any damages caused to the State. Termination hereunder, including the rights and obligations of the parties, shall be governed by the provisions of COMAR 21.07.01.11B.

- 8. **Termination for Nonappropriation.** If funds are not appropriated or otherwise made available to support continuation in any fiscal year succeeding the first fiscal year, this Contract shall be terminated automatically as of the beginning of the fiscal year for which funds are not available. The Contractor may not recover anticipatory profits or costs incurred after termination.
- 9. **Non-Discrimination in Employment.** The Contractor shall comply with the nondiscrimination provisions of federal and Maryland law, including, but not limited to, the employment provisions of §13-219 of the State Finance and Procurement Article, Maryland Code and Code of Maryland Regulations 21.07.01.08, and the commercial nondiscrimination provisions of Title 19, Subtitle 1, State Finance and Procurement Article, Maryland Code.
- 10. **Maryland Law Prevails.** The laws of Maryland shall govern the interpretation and enforcement of this Contract. The Maryland Uniform Computer Information Transactions Act (Commercial Law Article, Title 22 of the Annotated Code of Maryland) does not apply to this Contract or any software license acquired hereunder.
- 11. **Anti-Bribery.** The Contractor certifies that, to the Contractor's best knowledge, neither the Contractor; nor (if the Contractor is a corporation or partnership) any of its officers, directors, partners, or controlling stockholders; nor any employee of the Contractor who is directly involved in the business's contracting activities, has been convicted of bribery, attempted bribery, or conspiracy to bribe under the laws of any state or of the United States.
- 12. **Commercial Non-Discrimination Policy.** The Contractor shall comply with the provisions of State Finance and Procurement Article. Title 19, Annotated Code of Maryland.

IN WITNESS THEREOF, the parties have executed this Contract as of the date hereinabove set forth.

CONTRACTOR

STATE OF MARYLAND

DEPARTMENT OF HEALTH

(Seal)

By: _____

By: _____

(Printed Name and Title)

(Printed Name and Title)

Date

Date