

## REQUEST FOR PROPOSAL

RFP NUMBER: CSP908914  
INDEX NUMBER: AGE002  
UNSPSC CATEGORY: 81130000, 80140000

The state of Ohio, through the Department of Administrative Services, Office of Procurement Services, on behalf of the Ohio Department of Aging (ODA) is requesting Proposals for:

Administration of the National Core Indicators-Aging and Disabilities (NCI-AD) Survey for Consumers in Ohio

### MINORITY SET-ASIDE BID IN ACCORDANCE WITH ORC CH 125.081

OBJECTIVE: Implementation of the NCI-AD will enable Ohio to expand our learning about the strengths and weaknesses of the service delivery system for aging and disabilities and continue to craft plans to improve the quality of life of our consumers..

RFP ISSUED:	December 18, 2013
INQUIRY PERIOD BEGINS:	December 18, 2013
INQUIRY PERIOD ENDS:	January 7, 2014 at 8:00 AM
PROPOSAL DUE DATE:	January 15, 2014 by 1:00 PM

Offeror must submit both a "Technical Proposal" and a "Cost Proposal" as a part of its Proposal package. These are two separate components which shall be submitted in separate sealed envelopes/packages, clearly identified on the exterior as either "Technical Proposal" or "Cost Proposal" with the respective RFP Number and due date on each. Offeror must submit this signed cover page with its technical Proposal.

Submit Sealed Proposals to:

Department of Administrative Services  
Office of Procurement Services  
Attn: Bid Desk  
4200 Surface Road  
Columbus, OH 43228-1395

Note: Please review the [Proposal Instructions](#) on our Web site.

<b>Offeror Name and Address:</b>  _____  _____  _____  _____  E-Mail Address: _____  Phone Number: (        ) _____ - _____, Ext. _____	<b>Name/Title:</b>  _____  _____    Signature: _____  By submitting a response to this RFP, and signing above, Offeror acknowledges, understands and agrees to comply with the RFP requirements and confirms all the instructions and links have been read and understood.
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RFP GLOSSARY OF TERMS

AA:	Affirmative Action
Contractor:	Vendor after Award
CSP:	Competitive Sealed Proposal
DAS:	Department of Administrative Services
EOD:	Equal Opportunity Division
FEI:	Federal Employer Identification
Mandatory:	Must, Will, Shall
OAC:	Ohio Administrative Code
OAKS:	Ohio Administrative Knowledge System (Ohio's Accounting System)
OBG:	Ohio Business Gateway
Offeror:	Vendor Submitting Proposal
OPS:	Office of Procurement Services
ORC:	Ohio Revised Code
RFP:	Request for Proposal
SOS:	Secretary of State
UNSPSC:	The United Nations Standard Products and Services Code

## 1.0 EXECUTIVE SUMMARY

1.1 INTRODUCTION. This is a Request for Competitive Sealed Proposals (RFP) under Section 125.071 of the Ohio Revised Code (ORC) and Section 123:5-1-08 of the Ohio Administrative Code (OAC). The Department of Administrative Services (DAS), Office of Procurement Services, on behalf of the Ohio Department of Aging (the Agency), is soliciting competitive sealed proposals (Proposals) for Administration of the National Core Indicators-Aging and Disabilities (NCI-AD) Survey for Consumers in Ohio. If a suitable offer is made in response to this RFP, the state of Ohio (State), through DAS, may enter into a contract (the Contract) to have the selected Offeror (the Contractor) perform all or part of the Project (the Work). This RFP provides details on what is required to submit a Proposal for the Work, how the State will evaluate the Proposals, and what will be required of the Contractor in performing the Work.

This RFP also gives the estimated dates on page one, for the various events in the submission process. While these dates are subject to change, prospective Offerors must be prepared to meet them as they currently stand.

1.2 CONTRACT PERIOD. Once awarded, the term of the Contract will be from the award date through December 31, 2014. The State may solely renew all or part of this Contract at the discretion of DAS for a period of one month and subject to the satisfactory performance of the Contractor and the needs of the Agency. Any other renewals will be by mutual agreement between the Contractor and DAS for any number of times and for any period of time. The cumulative time of all mutual renewals may not exceed three (3) years and are subject to and contingent upon the discretionary decision of the Ohio General Assembly to appropriate funds for this Contract in each new biennium.

1.3 BACKGROUND. The National Core Indicators (NCI) project started in 1997 with a collaboration between Human Research Services Institute (HSRI) and the National Association of Developmental Disabilities Directors (NASDDDS) to collect and maintain valid and reliable data about the performance of public developmental disabilities service systems. The primary goal of NCI was to establish a standard set of performance and outcome measures to allow states to track their own performance over time, compare results across states, and establish national benchmarks. Beginning in July of 2008, the Department of Developmental Disabilities (DoDD) adopted the National Core Indicators (NCI) as a basis for measuring the performance of, and improving Ohio's service delivery system. Because of the importance of this work and the powerful information it provides to Ohio policy makers and partners, ODA has decided to partner with the National Association of States United for Aging and Disabilities (NASUAD) to pilot a new survey that expands the NCI to gauge the performance of state long-term care services and supports (LTSS) systems to include improving the life of seniors, adults with disabilities and their caregivers. This expansion is being referred to as National Core Indicators-Aging and Disabilities (NCI-AD). As a participant in NCI-AD, ODA will be able to share information that drives policy change and quality improvement.

When approaching new initiatives for the state agency, the Governor's Office of Health Transformation has set forth strategic priorities that will transform Ohio into a model of health and economic vitality. New projects and initiatives must meet one or more of these priorities to ensure we further Ohio's transformation. The following values are directly impacted by the knowledge gained through NCI-AD outcome measures:

1.3.1.1 Transparent. Make information about price and quality transparent, and get the right information to the right place at the right time to improve care and cut costs. NCI-AD makes transparent Ohio's performance on quality indicators that measures the performance of our aging and disabilities service systems. Ohio's data will be posted on the NCI web site and measured against other state data.

1.3.1.2 Long-Term Care. Enable seniors and people with disabilities to live with dignity in the setting they prefer, especially their own home, instead of a higher-cost setting like a nursing home. One of the indicators in NCI-AD allows the state to assess how well consumer's basic rights are respected and that they are treated with respect and dignity. Ohio will know what is important to the consumer in areas such as service quality, safety, access, and wellness and continue to design service systems to support what is important to our consumer.

1.3.1.3 Innovation. Innovate constantly to improve health and economic vitality – and demonstrate to the nation why Ohio is a great place to live and work. The NCI-AD survey is innovative in that it moves the state from outputs to outcomes-based systems that measures performance over-time, compares results across states and establishes national benchmarks.

In addition, the NCI-AD will also support the following strategies in the ODA Balanced Scorecard:

1.3.1.4 Accountability. Ohio is accountable to our consumers and other stakeholders. Data from NCI-AD will allow Ohio to measure quality of our service systems and is made transparent to consumers and other stakeholders via the NCI website.

1.3.1.5 Innovation and Improvement. As Ohio continues to move toward outcomes based measurement, NCI-AD provides us with an innovative tool that expands our knowledge to include measuring our performance against other states.

1.3.1.6 Build/Expand/Connect Partnerships. ODA is working with the Ohio Department of Medicaid to pilot the NCI-AD survey to consumer populations that cross multiple waiver programs and other community based delivery systems. Accessing multiple consumer populations, regardless of funding source, gives us a more accurate and honest assessment of Ohio's LTSS system.

1.3.1.7 Data Collection and Quality Management. The NCI-AD provides Ohio with new quality data not currently available in our client tracking systems. The new data set moves us from outputs data to outcome measurements.

The following proposal will focus on selecting the best vendor to conduct consumer interviews throughout the state while Ohio serves as a pilot state for NCI-AD.

- 1.3.2 Objective. Implementation of the NCI-AD will help the ODA continue to measure system performance and make improvements that will better support aging individuals, individuals with disabilities and their families in Ohio. It will enable Ohio to expand our learning about the strengths and weaknesses of the service delivery system for aging and disabilities and continue to craft plans to improve the quality of life of our consumers. In addition, implementation of the NCI-AD will allow Ohio to continue the evaluation of numerous cause and effect conditions such as the relationship between funding and quality outcomes, and the perceived effect on consumer satisfaction and quality of life.

The rationale for using NCI-AD is also based on the following;

1.3.2.1 The focus is on desired outcomes for people receiving services;

1.3.2.2 They have been determined to be valid and reliable;

1.3.2.3 They are currently being utilized in the Developmental Disabilities system in 29 other states;

1.3.2.4 They will allow Ohio to compare its performance with other states;

1.3.2.5 They align with the CMS Home and Community-Based Services Quality Framework; and

1.3.2.6 They support strategic system planning.

- 1.3.3 Purpose. As a result of implementing nationally recognized performance and outcome indicators on a continuing basis, individuals and families in Ohio's system for aging and disabilities will have the opportunity to become a strong voice in the service delivery system, and health and human service policy makers will continue to receive the information they need to focus on the desired outcomes for the people receiving those services.

ODA is issuing this Request for Proposals (RFP) to engage a contractor in a partnership with ODA in the *Administration of the National Core Indicators for Aging and Disabilities (NCI-AD) Consumer Survey* (<http://www.nationalcoreindicators.org/>)

#### 1.4 SCOPE OF WORK

##### Mission Statement

The mission of the Ohio Department of Aging (ODA) is to ensure that Ohio is on the leading edge of innovation and responsive to the growing and changing aging population.

##### Vision

Our vision is to safeguard that elders are respected as vital members of society who continue to grow, thrive and contribute.

##### ODA's Strategic Plan Goals Include

Elders are respected as vital members of society who continue to grow, thrive and contribute.

All state agencies and communities integrate aging needs into their plans and services.

Ohioans maintain quality of life and independence by taking preventive measures and maintaining their health throughout the lifespan.

Ohio's system of long-term services and supports reflects a balance between facility-based and home- and community-based services.

Aging Ohioans access a wide array of high quality services and supports that are person-centered in policy and practice and well-coordinated.

Ohioans and their caregivers make informed decisions as they age.

Policy makers and taxpayers see the Department as a responsible and innovative steward of resources.

#### 1.4.1. Project Design

ODA is issuing this Request for Proposals (RFP) to engage a contractor in a partnership with ODA to conduct 400 Consumer Surveys via face-to-face administration. The vendor may also be required to collect background information from case management staff at the Area Agencies on Aging in Ohio or other community based providers as designated by ODA

#### 1.4.2 Specifications of Deliverables

The following deliverables are components of implementing the following National Core Indicators Surveys;

1.4.2.1 Coordinate/schedule and complete the Pre-Survey Form for up to the 600 individuals randomly selected to participate via contact with the Area Agency on Aging or other community based providers as designated by ODA (which may include contractor meeting in-person at Area Agency on Aging to complete forms as necessary) on the Pre-Survey Forms provided;

1.4.2.2 Coordinate/schedule and complete the Background Information Form for each of the up to 600 individuals randomly selected to participate via contact with the Area Agency on Aging or other community based providers as designated by ODA (which may include contractor meeting in-person at Area Agency on Aging to complete forms as necessary) on the Background Information Forms provided;

1.4.2.3 Coordinate/schedule and complete a Consumer Survey/Interview with a total of 400 randomly selected individuals via face-to-face interviews with each person at the location of the person's choice, using the National Core Indicators Consumer Survey form provided (subject to addition of questions as deemed appropriate by ODA/HSRI);

1.4.2.4 Input all data collected into Excel spreadsheet and send to the Human Services Research Institute's (HSRI) on a regularly scheduled basis;

1.4.2.5 Provide the ODA NCI Project Manager a copy of all data uploaded to HSRI in Excel format on a regularly scheduled basis;

1.4.2.6 Prepare and transmit the schedule for all aspects of the work as outlined in this proposal via e-mail to the ODA NCI Project Manager, Felicia Sherman.

1.4.2.7 Complete and send monthly reports regarding all aspects of the work including, but not limited to; status, risks mitigated, and progress, via e-mail to the ODA NCI Project Manager, Felicia Sherman.

1.4.3 The contracted services and the Proposal from the Offeror shall include, but not be limited to, the following areas:

1.4.3.1 How the Offeror will:

1.4.3.2 Schedule and complete up to (600) Consumer Pre-Survey forms;

1.4.3.3 Schedule and complete up to (600) Consumer Background Information forms;

1.4.3.4 Schedule and implement up to a total of (400) face-to-face Consumer Surveys;

1.4.3.5 Determine staffing as related to administration of a., b., & c. above;

1.4.3.6 Adhere to survey administration training guidelines as determined by HSRI;

ODA Request for Proposals Administration of the National Core Indicators Survey for Aging and Disabled Consumers in Ohio -Year 1

1.4.3.7 Comply with all HIPAA & privacy regulations as they relate to individuals served and their families;

1.4.3.8 Collect and store survey data;

1.4.3.9 Transfer survey data to ODA and HSRI;

1.4.3.10 Complete and transmit the work schedule to ODA;

1.4.3.11 Complete and transmit monthly reports to ODA.

#### 1.4.4 Project Work Plan:

1.4.4.1 Provide a draft work plan outlining how the Offeror will address the deliverables in #1 above. Upon notification, the selected Offeror's project manager shall prepare a presentation for the ODA to be made no later than January 31, 2014 outlining the final work plan to be followed for completion of all deliverables. The delivery date may be adjusted based on the date of contract award.

1.4.4.2 The final work plan may be negotiated between ODA and the selected Offeror after the presentation. Upon written approval of the final work plan by ODA the successful Offeror may begin implementation of the project no earlier than the "Start Work Date" as indicated in the contract. Documentation of ODA approval will be provided in electronic form within ten working days of the selected Offeror's final, proposed work plan.

1.4.4.3 Regular updates to the work plan shall be submitted to the ODA Project Manager on at least a monthly basis, or more frequently as needed to communicate progress, through the duration of the contract.

#### 1.4.5 Meetings and Communications:

1.4.5.1 The selected Offeror will participate in monthly status updates, in person or via electronic mail/e-mail, with designated ODA staff, to assure the project is on track and addressing each of the objectives and deliverables.

1.4.5.2 The selected Offeror will determine the method/mode of communicating project status updates (for example, the submission of a project work plan update will be made prior to a meeting with ODA staff).

1.4.5.3 The selected Offeror shall reference the frequency and mode of communicating with the ODA contact, in the proposed work plan (e.g., electronic mail/e-mail, phone, fax, hard copy). The selected Offeror's contact person shall also be designated on the work plan, including all pertinent contact information.

#### 1.4.6 Feedback:

1.4.6.1 ODA will make staff available, as negotiated in the selected Offeror's final work plan.

1.4.6.2 ODA will make contact information available as appropriate and will assist the selected Offeror in finding appropriate resources.

#### 1.4.7 Follow-up.

1.4.7.1 The selected Offeror will provide follow-up consultation with the ODA Project Manager on at least a monthly basis or as deemed necessary.

- 1.5 CONFIDENTIAL, PROPRIETARY OR TRADE SECRET INFORMATION DAS procures goods and services through a RFP in a transparent manner and in accordance with the laws of the state of Ohio. All proposals provided to DAS in response to this RFP become records of DAS and as such, will be open to inspection by the public after award unless exempt from disclosure under the Ohio Revised Code or another provision of law.

Unless specifically requested by the State, an Offeror should not voluntarily provide to DAS any information that the Offeror claims as confidential, proprietary or trade secret and exempt from disclosure under the Ohio Revised Code or another provision of law. Additionally, the Offeror must understand that all Proposals and other material submitted will become the property of the State and may be returned only at the State's option. Confidential, proprietary or trade secret information should not be voluntarily included in a Proposal or supporting materials because DAS will have the right to use any materials or ideas submitted in any Proposal without compensation to the Offeror.

See Instructions for further detail.

- 1.6 REGISTRY OF OFFERORS DAS will prepare a registry of Proposals containing the name and address of each Offeror. The registry will be on the Office of Procurement Services Web site and open for public inspection after the Proposals are received.

- 1.7 INSTRUCTIONS  
Link to Web site for Instructions is available in Section 5.1.

- 1.8 REQUIRED REVIEW  
Offerors shall carefully review the entire RFP and all the referenced Web links. Offerors shall promptly notify DAS through the inquiry process of any ambiguity, inconsistency, or error they discover. Notifications must be received by the deadline for receipt of questions in the inquiry process.

- 1.9 NUMBER OF PROPOSALS TO SUBMIT Offeror must submit one (1) original, completed and signed in blue ink, and five (5) copies for a total of six (6) Proposal packages. The Offeror must also submit a complete copy of the Proposals on a CD in Microsoft Office (Word, Excel, or Project) 2003 or higher, format and/or PDF format as appropriate.

## 2.0 EVALUATION OF PROPOSALS

- 2.1 MANDATORY REQUIREMENTS The following Table 1 contains items that are Mandatory Requirements for this RFP.

Determining the Offeror's ability to meet the Mandatory Requirements is the first step of the DAS evaluation process. The Offeror's response must be clearly labeled "Mandatory Requirements" and collectively contained in Tab 2 of the Offeror's Proposal in the "Offeror Required Information and Certification" section.

DAS will evaluate Tab 2 alone to determine whether the Proposal meets all Mandatory Requirements (accept/reject). If the information contained in Tab 2 does not clearly meet every Mandatory Requirement, the Proposal may be disqualified by DAS from further consideration.

2.2 TABLE 1 - MANDATORY PROPOSAL REQUIREMENTS

Mandatory Requirements
There are no mandatory requirements for CSP908914

If the State receives no Proposals meeting all of the mandatory requirements, the State may elect to cancel this RFP.

2.3 PROPOSAL EVALUATION CRITERIA If the Offeror provides sufficient information to DAS in its Proposal, demonstrating it meets the Mandatory Requirements, the Offeror's Proposal will be included in the next step of the evaluation process which involves the scoring of the Proposal Technical Requirements (Table 3), followed by the scoring of the Cost Proposals. In the Proposal evaluation step, DAS rates the Proposals based on the following listed criteria and the weight assigned to each criterion. The possible points allowed in this RFP are distributed as indicated in the Table 2 - Scoring Breakdown. Each Proposal passing the Mandatory Requirements will be evaluated by an evaluation committee made up of a representative(s) from DAS, Agency team members, and potentially a subject matter expert or an independent consultant.

2.4 TABLE 2 - SCORING BREAKDOWN

Criteria	Maximum Allowable Points
Proposal Technical Requirements	500 Points
Proposal Cost	50 Points
Total	550 Points

The scale below (0-5) will be used to rate each proposal on the criteria listed in the Technical Proposal Evaluation table.

DOES NOT MEET 0 POINTS	WEAK 1 POINT	WEAK TO MEETS 2 POINTS	MEETS 3 POINTS	MEETS TO STRONG 4 POINTS	STRONG 5 POINTS
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DAS will score the Proposals by multiplying the score received in each category by its assigned weight and adding all categories together for the Offeror's Total Technical Score in Table 3. Representative numerical values are defined as follows:

DOES NOT MEET (0 pts.): Response does not comply substantially with requirements or is not provided.

WEAK (1 pt.): Response was poor related to meeting the objectives.

WEAK TO MEETS (2 pts.): Response indicates the objectives will not be completely met or at a level that will be below average.

MEETS (3 pts.): Response generally meets the objectives (or expectations).

MEETS TO STRONG (4 pts.): Response indicates the objectives will be exceeded.

STRONG (5 pts.): Response significantly exceeds objectives (or expectations) in ways that provide tangible benefits or meets objectives (or expectations) and contains at least one enhancing feature that provides significant benefits.

2.5 TABLE 3 - TECHNICAL PROPOSAL EVALUATION

Criterion	Weight	Rating (0 to 5)	Extended Score
<b>Offeror Profile (Form 5.2.3)</b>			
The Offeror must provide documentation that demonstrates experience leading long-term care resident satisfaction surveys and of similar size and scope demonstrating its qualifications and experience.	10		
<b>Offeror Prior Projects (Form 5.2.4)</b>			
The Offeror's Proposal reflects at least three (3) previous jobs with similar projects in Ohio or other states for CMS within the past five (5) years.	20		
<b>Staffing Plan (Forms 5.2.5 and 5.2.6)</b>			
The Proposal reflects the project staffing and demonstrates the competence, knowledge, and qualifications of all employees and subcontractors as outlined in the RFP and as applicable to achieving the deliverables.	10		
<b>Scope of Work</b>			
1. The Offeror's Proposal clearly outlines the method for achieving each of the deliverables.	20		
2. The Offeror's Proposal outlines a draft project work plan with realistic methods for achieving the deliverables (includes a detailed schedule) within the timeframes outlined in the RFP.	20		
3. The Offeror's Proposal includes procedures for communication throughout the contract period and status updates to the ODA (format and mode) as stated in the RFP.	5		
4. The Offeror's Proposal must include a timeline with details to complete this project.	10		
5. The Offeror shall include any anticipated difficulties in performing the specified Project requirements and proposed solutions to those difficulties.	5		

Total Technical Score: \_\_\_\_\_

In this RFP, DAS asks for responses and submissions from Offerors, most of which represent components of the above criteria. While each criterion represents only a part of the total basis for a decision to award the Contract to an Offeror, a failure by an Offeror to make a required submission or meet a mandatory requirement will normally result in a rejection of that Offeror's Proposal. The value assigned above to each criterion is only a value used to determine which Proposal is the most advantageous to the State in relation to the other Proposals that DAS received.

Once the technical merits of a Proposal are evaluated, the costs of that Proposal will be considered. It is within DAS' discretion to wait to factor in a Proposal's cost until after the conclusion of any interviews, presentations, demonstrations or discussions. Also, before evaluating the technical merits of the Proposals, DAS may do an initial review of costs to determine if any Proposals should be rejected because of excessive cost. DAS may reconsider the excessiveness of any Proposal's cost at any time in the evaluation process.

- 2.6 COST PROPOSAL POINTS DAS will use the information Offeror gives on the Cost Summary Form to calculate Cost Proposal Points. DAS will calculate the Offeror's Cost Proposal points after the Offeror's total technical points are determined, using the following method:

Cost points = (lowest Offeror's cost/Offeror's cost) x Maximum Allowable Cost Points as indicated in the "Scoring Breakdown" table. The value is provided in the Scoring Breakdown table. "Cost" = Total Not to Exceed Cost identified in the Cost Summary section of Offeror's Proposal. In this method, the lowest cost proposed will receive the maximum allowable points.

The number of points assigned to the cost evaluation will be prorated, with the lowest accepted Cost Proposal given the maximum number of points possible for this criterion. Other acceptable Cost Proposals will be scored as the ratio of the lowest Cost Proposal to the Proposal being scored, multiplied by the maximum number of points possible for this criterion.

An example for calculating cost points, where Maximum Allowable Cost Points Value = 60 points, is the scenario where Offeror X has proposed a cost of \$100.00. Offeror Y has proposed a cost of \$110.00 and Offeror Z has proposed a cost of \$120.00. Offeror X, having the lowest cost, would get the maximum 60 cost points. Offeror Y's cost points would be calculated as \$100.00 (Offeror X's cost) divided by \$110.00 (Offeror Y's cost) equals 0.909 times 60 maximum points, or a total of 54.5 points. Offeror Z's cost points would be calculated as \$100.00 (Offeror X's cost) divided by \$120.00 (Offeror Z's cost) equals 0.833 times 60 maximum points, or a total of 50 points.

Cost Score: \_\_\_\_\_

- 2.7 FINAL STAGES OF EVALUATION The Offeror with the highest point total from all phases of the evaluation (Technical Points + Cost Points) will be recommended for the next phase of the evaluation.

Technical Score: \_\_\_\_\_ + Cost Score: \_\_\_\_\_ = Total Score: \_\_\_\_\_

If DAS finds that one or more Proposals should be given further consideration, DAS may select one or more of the highest-ranking Proposals to move to the next phase. DAS may alternatively choose to bypass any or all subsequent phases and make an award based solely on the Proposal evaluation phase.

- 2.8 REJECTION OF PROPOSALS DAS may reject any Proposal that is not in the required format, does not address all the requirements of this RFP, or that DAS believes is excessive in price or otherwise not in the interest of the State to consider or to accept. In addition, DAS may cancel this RFP, reject all the Proposals, and seek to do the Work through a new RFP or by other means.

3.0 COST SUMMARY

3.1 SUBMISSION The Cost Summary shall be submitted with the Proposal (under separate cover labeled as the Cost Proposal). All prices, costs, and conditions outlined in the Proposal shall remain fixed and valid for acceptance for 120 days, starting on the due date for Proposals. No price change shall be effective without prior written consent from DAS, Office of Procurement Services.

The Offeror's total cost for the entire Work must be represented as the firm, fixed price, for a not-to-exceed total. All costs for furnishing the services must be included in the Cost Proposal.

3.2 THE OFFEROR'S FEE STRUCTURE The Contractor will be paid as proposed on the Cost Summary after the Agency approves the receipt of product(s)/services and continued completion of all deliverables. All costs must be in U.S. Dollars.

3.3 REIMBURSABLE EXPENSES None; there will be no additional reimbursement for travel or other related expenses. The State will not be responsible for any costs not identified.

3.4 BILL TO ADDRESS

Agency Bill to  
Ohio Department of Aging  
Attn: Accounts Payable  
50 West Broad Street  
9th Floor  
Columbus, OH 43215-3363  
ODAINvoices@age.ohio.gov.

Administration of the National Core Indicators-Aging and Disabilities (NCI\_AD) Survey for Consumers in Ohio  
CSP908914  
UNSPSC CATEGORY CODE: 81130000, 80140000  
BUDGET: \$55,000.00

OFFEROR: \_\_\_\_\_

Description	Cost
Coordinate, schedule and complete the Pre-Survey Form for up to the 600 individuals randomly selected to participate via contact with the Area Agency on Aging (which may include Contractor meeting in-person at Area Agency on Aging to complete forms as necessary) on the Pre-Survey Forms provided;	\$
Coordinate, schedule and complete the Background Information Form for each of the up to 600 individuals randomly selected to participate via contact with the Area Agency on Aging (which may include Contractor meeting in-person at Area Agency on Aging to complete forms as necessary) on the Background Information Forms provided;	\$
Coordinate, schedule and complete a Consumer Survey/Interview with a total of 400 randomly selected individuals via face-to-face interviews with each person at the location of the person's choice, using the National Core Indicators Consumer Survey form provided (subject to addition of questions as deemed appropriate by ODA/HSRI);	\$
Input all data collected into Excel spreadsheet and send to the Human Services Research Institute's (HSRI) on a regularly scheduled basis;	\$

Provide the ODA NCI Project Manager a copy of all data uploaded to HSRI in Excel format on a regularly scheduled basis;	\$
Prepare and transmit the schedule for all aspects of the Work as outlined in this proposal via e-mail to the ODA NCI Project Manager, Felicia Sherman.	\$
Complete and send monthly reports regarding all aspects of the Work including, but not limited to; status, risks mitigated, and progress, via e-mail to the ODA NCI Project Manager, Felicia Sherman.	\$
Total, Not to Exceed Cost.	\$

All costs must be in U.S. Dollars.

All Offerors who seek to be considered for a contract award must submit the above information in the format specified. The Original Cost Summary must be included in a separate, sealed envelope/package labeled on the exterior as "Cost Proposal" with the RFP Number and due date.

4.0 AWARD OF THE CONTRACT

4.1 CONTRACT AWARD DAS intends to award the Contract based on the schedule in the RFP, if DAS decides the Work is in the best interests of the State and has not changed the award date.

DAS expects the Contractor to commence the Work upon receipt of a state issued purchase order. If DAS awards a Contract pursuant to this RFP and the Contractor is unable or unwilling to commence the Work, DAS reserves the right to cancel the Contract and return to the original RFP process and evaluate any remaining Offeror's Proposals reasonably susceptible of being selected for award of the Contract. The evaluation process will resume with the next highest ranking, viable Proposal.

4.2 CONTRACT If this RFP results in a Contract award, the Contract will consist of this RFP including the Terms and Conditions, all forms, written addenda to this RFP, the Contractor's accepted Proposal and written authorized addenda to the Contractor's Proposal. It will also include any materials incorporated by reference in the above documents and any purchase orders and amendments issued under the Contract. The general terms and conditions for the Contract are contained in the following link:

<https://procure.ohio.gov/Zip/5.3%20Terms%20and%20Conditions.pdf>

If there are conflicting provisions between the documents that make up the Contract, the order of precedence for the documents is as follows:

1. The one-page Contract Signature Page, Form 5.2.2
2. The RFP, as amended, including the Terms and Conditions;
3. The documents and materials incorporated by reference in the RFP;
4. The Executive Order. EO2011-12K incorporated by reference in the RFP;
5. The Contractor's Proposal, as amended, clarified, and accepted by the State; and
6. The documents and materials incorporated by reference in the Contractor's Proposal.

Notwithstanding the order listed above, amendments issued after the Contract is executed may expressly change the provisions of the Contract. If they do so expressly, then the most recent amendment will take precedence over anything else that is part of the Contract.

## 5.0 LINKS

To be applicable to all Proposals and subsequent award(s), including sections named below:

### 5.1 Instructions

- 5.1.1 Proposal Instructions
- 5.1.2 Evaluation of Proposals
- 5.1.3 Proposal Format & Documentation Required

### 5.2 Forms

- 5.2.1 Offeror Required Information
- 5.2.2 Contract Signature Page
- 5.2.3 Offeror Profile
- 5.2.4 Offeror Prior Projects
- 5.2.5 Offeror's Candidate References
- 5.2.6 Offeror's Candidate Education, Training, Experience
- 5.2.7 Offeror Performance Form
- 5.2.8 Contractor/Subcontractor Affirmation and Disclosure

### 5.3 Terms and Conditions

- 5.3.1 Performance and Payment
- 5.3.2 Work and Contract Administration
- 5.3.3 Ownership & Handling of Intellectual Property & Confidential Information
- 5.3.4 Representations, Warranties and Liabilities
- 5.3.5 Acceptance and Maintenance
- 5.3.6 Construction
- 5.3.7 Law & Courts

### 5.4 Additional Resources

EOD Reporting	<a href="http://eodreporting.oit.ohio.gov/searchAffirmativeAction.aspx">http://eodreporting.oit.ohio.gov/searchAffirmativeAction.aspx</a>
Office of Budget and Management	<a href="http://obm.ohio.gov/LandingPages/Vendor/default.aspx">http://obm.ohio.gov/LandingPages/Vendor/default.aspx</a>
Office of Procurement Services	<a href="http://procure.ohio.gov/proc/index.asp">http://procure.ohio.gov/proc/index.asp</a>
Ohio Shared Services	<a href="http://www.ohiosharedservices.ohio.gov/Home.aspx">http://www.ohiosharedservices.ohio.gov/Home.aspx</a>
Ohio Business Gateway	<a href="http://business.ohio.gov/">http://business.ohio.gov/</a>
Ohio Secretary of State	<a href="http://www.sos.state.oh.us/SOS/Businesses.aspx">http://www.sos.state.oh.us/SOS/Businesses.aspx</a>

All links are subject to change in accordance with state of Ohio laws, Ohio Revised Code, Ohio Administrative Code, Executive Orders or any other updates issued by the state of Ohio, Department of Administrative Services, and the Office of Procurement Services. It is the Offeror's responsibility to read and be aware of any changes, corrections, updates or deletions to any information included in the link(s) above.

6.0 Guide for Proposal Submission.

This guide outlines steps for submission of a Proposal in response to the advertised Request for Proposal. This guide does not contain the complete instructions for preparing and submitting a Proposal and anything stated herein shall not be considered a term or condition of the Contract. The complete instructions can be found in section 5.1.1, Proposal Instructions.

- 6.1 \_\_\_\_\_ Read the entire document, including all Web site links. Note critical items such as: Mandatory Requirements; goods or services required, submittal date and time; number of copies to submit; contract requirements; reporting requirements; minimum qualifications; read and understand the terms and conditions.
- 6.2 \_\_\_\_\_ Take advantage of the “question and answer” period specified in the schedule of events. Questions must be submitted on-line in the Inquiry Process as explained in the Instructions. See section 5.1.1, Proposal Instructions.
- 6.3 \_\_\_\_\_ Follow the format required in the RFP Instructions when preparing the response in chronological order. Provide point-by-point responses to all sections in a clear and concise manner. See section 5.1.3, Proposal Format & Documentation Required.
- 6.4 \_\_\_\_\_ Use the forms provided; i.e. Signed RFP Cover Page, Offeror Required Information, Contract Signature Page, Offeror Profile and Prior Projects, Key Personnel forms, Disclosure Form, and Cost Summary Form, See section 5.2, Forms.
- 6.5 \_\_\_\_\_ Provide complete answers/descriptions. Do not assume the State or any evaluation committee member will know what the Offeror’s capabilities are or what items/services the Offeror can provide, even if previously contracted with the State. The Proposals are evaluated based solely on the information and materials provided in the Offeror’s response.
- 6.6 \_\_\_\_\_ Check the State’s Web site for RFP addenda. It is the responsibility of the Offeror to be aware of additional information posted on the Web.
- 6.7 \_\_\_\_\_ The following documents may be submitted with the Proposal or within five (5) business days of request from the Office of Procurement Services: Affirmative Action and proof of insurance. No award will be made without this documentation. Offeror’s Proposal may be eliminated from further consideration upon failure to submit within the specified time frame
- 6.8 \_\_\_\_\_ If not a current vendor of the state of Ohio, the Offeror will download both the W-9 and Vendor Information Form and submit to Ohio Shared Services (OSS) at [vendor@ohio.gov](mailto:vendor@ohio.gov). See section 5.4, Additional Resources.
- 6.9 \_\_\_\_\_ Review and read the RFP Document again to make sure that you have addressed all requirements. Read and understand Supplements, if applicable. Offeror’s original response and the requested copies must be identical and be complete. The copies are provided to the evaluation committee members and used to score the response.
- 6.10 \_\_\_\_\_ Offeror’s response must be submitted on time. Late Proposals are never accepted. Make sure the response is labeled on the exterior of the envelope/package with the RFP# and due date, and whether the packet is for the Technical Proposal or the Cost Proposal. Do not place the Cost Proposal in the Technical Proposal.

- 7.0 Offeror's Library ODA recognizes that Offerors may not be familiar with some of the documents referenced in this RFP. ODA has created a Offerors' Library to include:
- 7.0.1 National Core Indicators Project Narrative;
  - 7.0.2 Consumer Survey, which includes Pre-survey & Background Information forms;
  - 7.0.3 The above items may be viewed on the ODA website at, <http://aging.ohio.gov/information/NCI-AD/>, which will link to the National Core Indicators resources webpage.