



### REQUEST FOR PROPOSAL

RFP NUMBER: CSP903914  
INDEX NUMBER: EDU057  
UNSPSC CATEGORY: 86000000, 80171500

The state of Ohio, through the Department of Administrative Services, Office of Procurement Services, on behalf of the Ohio Department of Education, is requesting Proposals for:

#### FACILITATION OF EARLY CHILDHOOD PROJECT TEAMS AND COMMITTEES

**OBJECTIVE:** The purpose of this RFP is to hire an Offeror to organize committee meetings (four Project Teams, the Early Learning Childhood Advisory Council and the Early Education and Development Innovation Committee) facilitate discussion, create agendas, document discussion, and move the work of the committees forward in support of the early learning reform agenda.

RFP ISSUED: June 24, 2013  
INQUIRY PERIOD BEGINS: June 24, 2013  
INQUIRY PERIOD ENDS: July 10, 2013 at 8:00 AM  
PROPOSAL DUE DATE: July 17, 2013 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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TABLE OF CONTENTS

	<u>Section Number</u>
Cover Page (to be signed by Offeror) and Schedule of Events	Cover (Page 1)
Glossary of Terms	Page 2
Executive Summary (Objectives, Background and Scope of Work)	1.0
Evaluation of Proposals	2.0
Cost Summary	3.0
Award of the Contract	4.0
Links to Instructions, Forms, Terms and Conditions and additional resources	5.0
Guide for Proposal Submission	6.0

RFP GLOSSARY OF TERMS

AA:	Affirmative Action
Agency:	The Ohio Department of Education
Calendar Year:	January 1 through December 31 of the respective year
Committees:	Refer collectively to the Early Childhood Advisory Council, Project Teams and the Early Education and Development Innovation Committee
Contract Administrator:	The State representative responsible for contract administration
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
ODE:	The Ohio Department of Education
Offeror:	Vendor Submitting Proposal
OPS:	Office of Procurement Services
ORC:	Ohio Revised Code
RFP:	Request for Proposal
SOS:	Secretary of State
State of Ohio Fiscal Year:	The period of July 1 of one calendar year through June 30 of the following calendar year
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 Education (the Agency), is soliciting competitive sealed proposals (Proposals) for Facilitation of Early Childhood Project Teams and Committees. 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, 2015. 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 two (2) 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

In December 2011, Ohio was awarded the Race to the Top Early Learning Challenge Grant (RTT-ELC). Ohio's RTT-ELC is designed to dramatically improve our existing network of state-funded early childhood development programs which are essential to helping high-needs children begin kindergarten ready to learn. Ohio's RTT-ELC draws upon Governor Kasich's goal to close the kindergarten readiness gap between high-needs children and that of their peers. Ohio is committed to improving the odds for every child to start school and begin life ready to succeed. The grant work is implemented collaboratively by the Ohio Departments of Education (ODE), Job and Family Services (ODJFS), Health (ODH), Mental Health (ODMH) and Developmental Disabilities (DODD) under the leadership of the Office of Governor John Kasich. Ohio's RTT-ELC initiatives include the following:

- A. Create comprehensive child standards that programs will use to ensure that children are prepared academically, socially, emotionally and physically to move on to kindergarten.
- B. High quality assessments to inform instruction and support young students. Ohio is creating these in partnership with Maryland to save costs.
- C. Extensive professional development for early childhood educators. This is a crucial element given the urgent need to improve the skills of those working with children with high needs.
- D. A tiered quality rating and improvement system (expansion of Ohio's Step Up To Quality) that gives a clear and common way to measure program quality, no matter the setting, to inform parents, families and community.

The Office of Early Learning and School Readiness in the Ohio Department of Education (ODE) serves as the lead and fiscal agency for the RTT-ELC. A copy of the RTT-ELC grant application and other grant updates can be accessed at [www.earlychildhoodohio.org](http://www.earlychildhoodohio.org) or at [www.education.ohio.gov](http://www.education.ohio.gov) (enter "Early Learning Challenge grant" in the search box.).

#### 1.3.1 Goals. As detailed in the grant application, Ohio's overarching goals for the RTT-ELC grant are that:

- A. By 2015:
  1. 1,300 already funded early childhood settings will be rated as high-quality;
  2. 37,000 additional high-needs children will be placed in highly rated programs;
  3. The kindergarten-readiness gap will be closed by 5% for high-needs children and
- B. By 2020:
  1. Ohio will purchase services only in high-quality settings.

Note that more information on Ohio's goals and the methods to achieve these goals is included in the RTT-ELC application.

To coordinate the early learning and development system, several committees will be formed and led by the Governor's Early Education and Development Officer. The committees include four Project Teams, the Early Childhood Advisory Council and the Early Education and Development Innovation Committee.

- 1.3.2 Objectives. DAS has the following objectives that it wants this Work to fulfill, and it will be the Contractor's obligation to ensure that the personnel the Contractor provides are qualified to perform their portions of the Work.

The purpose of this RFP is to hire an Offeror to organize the above committee meetings, facilitate discussion, create agendas, document discussion, and move the work of the committees forward in support of the early learning reform agenda. The awarded Contractor will support the implementation, facilitation, and work of the following committees:

- A. Project Team 1: Quality, Access, and Financing
- B. Project Team 2: Standards and Assessment
- C. Project Team 3: Family Engagement
- D. Project Team 4: Professional Development
- E. Early Childhood Advisory Council
- F. Early Education and Development Innovation Committee

#### 1.4 SCOPE OF WORK

Ohio has over 860,000 children ages birth to 5. More than half of the 860,000 children are considered high needs based on family income, native language, and/or disability/delay. High needs children start school behind and many will never catch up. Ohio licenses or certifies over 11,000 early childhood programs statewide that have the capacity to serve over 300,000 children. Approximately 47 percent of children ages 3 to 5 and approximately 19 percent of children ages birth to 2 are served in a licensed setting. In addition, within these licensed settings, Ohio funds early learning and development programs that are designed to serve children with high needs.

##### 1.4.1 Project Participants

###### A. Early Education and Development Officer

Ohio is committed to creating a seamless, results-based educational system in Ohio that begins with children during the early childhood years. The foundation of a seamless birth-through-college educational system is the coordination and alignment of the many agencies providing services and programs for Ohio's youngest children. To this end, Governor Kasich established a single point of accountability for early learning services. The Early Education and Development Officer is accountable for achieving the ambitious targets outlined in both the Governor's reform agenda and the RTT-ELC grant, and those results are a critical component to realizing the Governor's vision of a seamless birth-to-20 educational system that leads to better academic outcomes for Ohio's children. The Early Education and Development Officer is responsible for the appointment, direction, and accomplishments of the Project Teams, Early Childhood Advisory Council and Early Education and Development Innovation Committee to support this vision and to ensure the advancement of the early learning system.

###### B. Project Teams

The Early Education and Development Officer is responsible for coordinating and managing the following four distinct project teams that focus on key aspects of both the Governor's overall reform agenda and the work described in this application in order to close the kindergarten readiness gap between high-needs children and their peers:

1. Quality, access, and financing
2. Assessment and standards
3. Family support and engagement
4. Professional development

Each project team will be made up of approximately 25 individuals that include local, regional, or state level early childhood stakeholders. This includes a staff person from one of each of these agencies on each of the four project teams: Ohio Departments of Education, Job and Family Services, Health, Mental Health, and Developmental Disabilities,. Each project team will have a designated chairperson. The Early Education and Development Officer will work with each project team's chairperson to coordinate the designated project team. The charge of each group is as follows:

- a. Quality, Access, and Financing Charge. The Quality, Access, and Financing Project team is charged with:
  - 1) increasing the overall participation of children in new or existing federal, state and local early learning and development programs;
  - 2) analyzing and streamlining existing eligibility and payment processes and procedures;
  - 3) increasing the quality of early childhood programs, and
  - 4) monitoring the quality of state and federally funded early childhood initiatives (e.g., Tiered Quality Rating and Improvement System, Home Visiting, Early Intervention).

- b. Assessment and Standards Charge. The Assessment and Standards Project Team is charged with making recommendations on:
  - 1) the implementation of Ohio's comprehensive early learning and development standards for birth to kindergarten entry and their alignment to K-3 standards, and
  - 2) the implementation of assessments that support the birth to kindergarten entry continuum aligned to K-3 assessments.
- c. Family Support and Engagement Charge. The Family Support and Engagement Project team is charged to:
  - 1) identify barriers to family access and family engagement in early learning and development program;
  - 2) ensure state agencies are effectively promoting family engagement;
  - 3) recommend policy changes to increase participation and family engagement in early learning and development programs;
  - 4) identify opportunities to increase participation by supporting local initiatives, and
  - 5) measure success in increasing participation through data collection.
- d. Professional Development Charge. The Professional Development project team is charged to:
  - 1) develop recommendations regarding statewide professional development and career advancement plans for early childhood educators, and
  - 2) assess the capacity and effectiveness of 2 and 4 year public and private institutions of higher education to support the development of pre-service and in-service early childhood educators.

C. Early Childhood Advisory Council

In addition to the strong infrastructure identified with the Officer and the project teams, Governor Kasich values input and guidance from all early learning stakeholders through the state's Early Childhood Advisory Council (ECAC). The ECAC's geographically and ethnically diverse membership represents the perspectives of foundations, early childhood advocacy groups, providers, parent and family groups, state and local school board representatives, county human service agencies, health care providers, and higher education. The Early Education and Development Officer and the ECAC chairperson convene the ECAC monthly to share progress on the reform agenda, vet policy and operational considerations, and discuss issues brought forward by ECAC members. In addition the ECAC members will lend their expertise to the four project teams. The ECAC is made up of 25 individuals. It should be noted that the ECAC is funded through August 2013 with federal grant funding through a different source than RTT-ELC and therefore the ECAC meetings will be supported through this funding through August 2013. Beginning in September 2013, the meeting support for the ECAC meetings will fall under this contract.

D. Early Education and Development Innovation Committee

Ohio also plans to formalize a partnership with the business community to maximize private-sector resources to achieve the goals outlined in the State's RTT-ELC application. To ensure that the private sector thread runs through early learning policy in the State, Governor Kasich created the Early Education and Development Innovation Committee. Based on the October 2011 Executive Order, the Committee will be comprised of senior leaders from two prominent Ohio businesses, one philanthropic organization, a major research organization, and a children's health care organization. This committee will coordinate with the ECAC and provide leadership to:

- 1. Mobilize business partnerships at the local level to achieve community and statewide kindergarten readiness goals
- 2. Bring private-sector tools and resources to early learning policies and practices to advance the goals outlined in the grant.

The committee will assist the Early Education and Development Officer in disseminating information annually to the legislature, leaders in local communities, and the public on the state of school readiness in Ohio. The group will be convened by the Early Education and Development Officer. To ensure this committee's coordination and alignment with the ECAC, the Chair of the ECAC will participate in these meetings. The committee will be made up of 8 to 10 members.

1.4.2 Deliverables

The following are the key deliverables for work from award of this contract to December 31, 2015.

- A. Identify and reserve meeting space for all committee meetings and convene meetings.
- B. Convene meetings per the schedule of the specific committee.
- C. Make meetings available to participants via conference call and/or webinar technology.
- D. Meet with appropriate chairs and state leadership to create meeting agendas.
- E. Provide all meeting materials, supplies, and presenters to support the meeting.

- F. Facilitate group discussion at all committee meetings.
- G. Document discussion in formal meeting minutes and notes for distribution to participants.
- H. Communicate with committee members regarding meeting location, schedule, agenda items, reminders, and other necessary information.
- I. Create annual report summarizing each committee’s accomplishments and/or recommendations.
- J. Provide reports to Ohio Department of Education as required.

The following provides details for each of the above deliverables.

- A. Identify and reserve meeting space for all committee meetings.  
Table 1 provides an anticipated schedule for each committee. There are a total of 96 meetings anticipated to be scheduled for all committee meetings between the award and December 31, 2015. The awarded Contractor will need to reserve, pay for (if applicable), and schedule space for each in-person committee meeting. All 96 committee meetings are expected to meet in person. The meeting space must be large enough for each committee’s membership and have capability to connect to the Internet (Wi-Fi is ideal) and have space for projection, presentations, and chart paper as needed. All meeting dates will be determined in conjunction with the Early Education and Development Officer, but the expectation is that dates will be identified upon award and that meeting space will be reserved.
- B. Convene meetings per the schedule of the specific committee.  
The Early Childhood Advisory Committee is currently scheduled 10:30 am to 1:30 pm for each meeting on the third Thursday of every month. Each Project Team will meet every other month. Two of the project teams will meet simultaneously following the Early Childhood Advisory Committee one month, while the other two project teams will meet simultaneously following the Early Childhood Advisory Committee the next month (see chart below for schedule). Each project team is anticipated to meet for two hours. The Early Education and Development Innovation Committee meeting will be no more than 1.5 hours in length for each meeting. Meetings dates and times are subject to change based on the needs of the Chair, the team, or the Early Education and Development Officer. Project teams may choose to meet more frequently than every other month depending on the needs of the project team. However, the facilitator will only need to be available for the bi-monthly schedule specified in the chart below. Currently, the Quality, Access, and Financing Team anticipates meeting monthly. The following table displays the anticipated schedule and where dates have already been set they are included below.

Table 1 Anticipated Schedule of Meetings for All Teams

	<b>Project Team 1 Quality, Access, and Financing</b>	<b>Project Team 2 Standards and Assessment</b>	<b>Project Team 3 Family Engagement</b>	<b>Project Team 4 Professional Development</b>	<b>Early Childhood Advisory Council</b>	<b>Early Education and Development Innovation Committee</b>
FY2014						
July	set for July 18		set for July 18			
August		set for August 22		set for August 22		
September	set for September 19		set for September 19		X	X
October		Set for October 17		set for October 17	X	
November	set for November 21		set for November 21		X	
December		set for December 19		set for December 19	X	X
January	X		X		X	
February		X		X	X	
March	X		X		X	X
April		X		X	X	
May	X		X		X	
June		X		X	X	

FY2015						
July	X		X		X	
August		X		X	X	
September	X		X		X	X
October		X		X	X	
November	X		X		X	
December		X		X	X	X
January	X		X		X	
February		X		X	X	
March	X		X		X	X
April		X		X	X	
May	X		X		X	
June		X		X	X	
FY2016						
July	X		X		X	
August		X		X	X	
September	X		X		X	X
October		X		X	X	
November	X		X		X	
December		X		X	X	X
ANTICIPATED TOTAL MEETINGS	16	16	16	16	28	9

- C. Make meetings available to participants via conference call and/or webinar technology.  
All meetings will be convened with the goal of in-person attendance by all members. However, for attendees who cannot attend in person, the Contractor must provide a conference call line on a high quality conference call phone with good reception. The Contractor must also use webinar technology as appropriate for the presentations scheduled for the meeting.
- D. Meet with appropriate chairs and state leadership to create meeting agendas.  
In advance of each committee meeting, the Contractor shall schedule a conference call with the appropriate committee chairperson and the Early Education and Development Officer to plan the meeting agenda. The Contractor will craft the agenda and send to the chairperson and Officer for review and approval. Each meeting to craft the agenda should not be more than one hour in length.
- E. Provide all meeting materials, supplies, and presenters to support the meeting.  
The Contractor will be responsible for the gathering, development, copying, organizing, and distribution of all meeting materials. Materials may be distributed via email or through use of an online document sharing tool. In addition, meeting materials will need to be provided in hard copy as well. The Contractor will be responsible for all chart paper, markers, pens, notepads, nametags, table tents, sign in sheets, and other materials as needed for each meeting.

As needed by the Chair and the Officer, the Contractor will contact external presenters or experts for particular meetings to request attendance. If external presenters require compensation to present at the meetings, the Contractor shall provide and reimburse speakers if necessary. However, Ohio's RTT-ELC grant has access to technical assistance through the US Departments of Education and Health and Human Services that may include one-time speakers or presenters. Therefore the Contractor should be prepared to work with ODE's Director of the Office of Early Learning and School Readiness (RTT-ELC project director) to determine if the RTT-ELC grant can cover particular speakers for particular purposes or needs. This requires approval of the US Departments of Education and Health and Human Services first and therefore must be planned well in advance of any meetings. Note that meals or beverages are not to be covered with these contracted funds. However, the Contractor is expected to arrange for box lunches for the ECAC members, if applicable, and those lunches must be paid for by the ECAC members, not the Contractor.

- F. Facilitate group discussion at all committee meetings.  
The awarded Contractor will be responsible for facilitating group discussion as designated by the committee Chair and Officer. While the respective Chairs of each committee will lead their meetings, each meeting may require facilitated group discussion that will ensure the committee formulates particular products or meets specific goals. The Chair and Officer will determine in advance at which meetings and for which agenda items this will be needed from the Contractor.
- G. Document discussion in formal meeting minutes and notes for distribution to participants.  
The Contractor will be responsible for taking notes and minutes for each meeting. All meeting minutes and notes shall be typed and prepared for distribution to all committee members and posted on a public website within ten (10) business days of the committee meeting. The minutes and notes must be reviewed and approved by the Chair and the Officer before distributing to the committee members.
- H. Communicate with committee members regarding meeting location, schedule, agenda items, reminders, and other necessary information.  
The Contractor will be responsible for sending monthly email communications to all committee members regarding meeting location, schedule, agenda items, reminders and any other necessary information. The Contractor must have an email address and will be provided with all committee member email addresses as appropriate. The Contractor will utilize a protocol for email communications with members that is established by the Chair and the Officer.
- I. Create annual report summarizing each committee's accomplishments and/or recommendations.  
The Contractor will provide an annual report that summarizes each committee's accomplishments and/or recommendations to the Chair and Officer. The annual reports will be due on January 6, 2014, January 5, 2015, and December 1, 2015. Dates are subject to change pending a request from US Departments of Education and Health and Human Services.
- J. Provide reports to Ohio Department of Education as required.  
The RTT-ELC requires reporting for program and fiscal monitoring. As required and requested, the Contractor will provide information to ODE to summarize the vendor activities, as well as the committee accomplishments.

#### 1.4.3 Leadership and Staffing

The Offeror must have sufficient staffing to meet the demands, complexities and breadth of this project. Designated professional facilitation and lead staff for this project must possess extensive experience as follows:

- A. Must possess a minimum of a Bachelor's degree.
- B. Must possess at least ten (10) years of work experience related to group facilitation, strategic planning, and group decision-making and problem solving.
- C. Must possess at least five (5) years of work experience with inter- or intra-agency experience in project management.
- D. At least three (3) years of experience working with early learning related topics.
- E. Experience designing an effective and custom meeting format based on needs of group.
- F. Must not be an employee of the Ohio Departments of Education, Job and Family Services, Health, Mental Health, or Developmental Disabilities.
- G. Must not have a personal or professional conflict of interest that would prevent objectivity.
- H. Must have a valid Ohio driver license.

#### 1.4.4 Reporting Records

The awarded Contractor must ensure that all minutes, meeting materials, data and results are stored in a secure way both electronically and hard copy. The Offeror must provide a written description of how it will secure all materials for the project. Security applies to Offeror's staff as well.

#### 1.4.5 Organizational Requirements

The Offeror must have staffing and personnel sufficient to fulfill the work of the project. The awarded Contractor must have capability to perform the work and have contingency plans if the primary plan is not able to meet the needs of the project.

#### 1.4.6 Legal Requirements

ODE will own and possess the copyright of all documentation, materials, professional development and training that is developed for this project during the project and in all subsequent years after the conclusion of the project.

- 1.4.7 **Software or Online Solutions**  
Any proposals recommending a software or online approach must consider lack of computing resources for committee members, lack of ongoing IT support, and ongoing external hosting costs.
- 1.4.8 **Work Plan**  
Offeror's Work Plan must clearly detail how it will meet all deliverables and all other requirements in the Scope of Work.
- 1.5 **CONFIDENTIAL INFORMATION** The process to procure goods and services by DAS is open to inspection by the public. DAS makes available prices (offered and accepted), terms of payment, Proposal materials, evaluation scores, product information, and other types of information DAS uses in evaluating and/or awarding the Contract, consistent with Ohio's public records law. DAS will seek to open the Proposals in a manner that avoids disclosing their contents. Additionally, DAS will seek to keep the contents of all Proposals confidential until the Contract is awarded. Further, the DAS will open for public inspection all Proposals provided to the DAS in response to this RFP after award.
- 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 three (3) copies for a total of four (4) 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	Accept	Reject
1. Offeror demonstrates prior experience facilitating and managing other large groups and committees within the last three (3) years.		
2. Offer demonstrates prior experience with facilitating groups or committees that focused on early childhood topics.		

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	1,395 Points
Proposal Cost	75 Points
Total	1,470 Points

The following scale (0-9) will be used to rate each Proposal on the criteria listed in the Technical Proposal Evaluation table.

DOES NOT MEET 0 POINTS	MEETS 5 POINTS	EXCEEDS 7 POINTS	GREATLY EXCEEDS 9 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.

MEETS (5 pts.): Response generally meets the objectives (or expectations).

EXCEEDS (7 pts.): Response indicates the objectives will be exceeded.

GREATLY EXCEEDS (9 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 9)	Extended Score
<b>Offeror Profile</b>			
Each Proposal must include a profile of the Offeror's history, capability, capacity, and relevant experience working on projects similar to this Work. (Complete Form 5.2.3).	10		
Demonstrated sufficiency of resources to meet the Project timeline and deliverables.	10		
Capacity and financial capability of the applicant to quickly undertake and successfully complete the required tasks for this Project.	5		
<b>Offeror Prior Projects</b>			
The Offeror provides, at a minimum, two (2) previous references for jobs similar to this Project within the last five (5) years and provides details of similarities. All references provided must be willing to be contacted and to answer questions and provide details of the projects performed by the Offeror. (Complete Form 5.2.4).	25		
<b>Staffing Plan</b>			
The Offeror must submit Personnel Profiles for proposed the Project Manager which include candidate's education, training, qualifications and proposed work assignment (Complete Forms 5.2.5 and 5.2.6). Offeror must clearly document how professional facilitation and lead staff meet all requirements listed in section 1.4.3.	10		

Criterion	Weight	Rating (0 to 9)	Extended Score
Proposed role definition of key personnel and the percentage of the time dedicated to the Work for respective role(s) and individuals.	5		
Expertise and previous experience of staff in facilitation of stakeholder meetings.	10		
Definitive description of a contingency plan for completing the Project, should the key project personnel become unavailable to work on this Project for any reason.	5		
<b>Scope of Work (Work Plan)</b>			
The Offeror must express a sound and thorough grasp of the intentions, realities and dynamics of Ohio's early learning system and the goals of the committees in advancing that system.	20		
The Offeror must demonstrate a clear understanding of the Project requirements and propose strategies that have a record of success in meeting the project requirements.	20		
The Offeror must clearly explain how it will accomplish this Project (Work Plan) incorporating all of the deliverables including a complete and clear plan how all of the requirements specific to this project will be implemented as required by the Scope of Work.	30		
Description of 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 cost. 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, speakers or other related expenses. The State will not be responsible for any costs not identified.

3.4 BILL TO ADDRESS  
Ohio Department of Education  
Office of Early Learning & School Readiness  
25 South Front Street, MS 208  
Columbus, OH 43215  
Attn: Michelle K. Smith

Funding Source. Race to the Top – Early Learning Challenge Grant

Facilitation of Early Childhood Project Teams and Committees  
CSP903914

UNSPSC CATEGORY CODE: 86000000, 80171500

BUDGET: The State estimates a budget for this Project of approximately \$600,000 for the term of the contract (through 12/31/15). Proposals priced at more than \$600,000 for the NOT-TO-EXCEED TOTAL PROJECT COST for the Contract term may be considered non-responsive due to excessive cost, and eliminated from the evaluation process.

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

<u>DESCRIPTION</u>	<u>COST FY14</u>	<u>COST FY15</u>	<u>COST FY16</u>
Meetings:			
1. Identify and reserve meeting space for all committee meetings and convene meetings.			
2. Convene meetings per the schedule of the specific committee.			
3. Make meetings available to participants via conference call and/or webinar technology.			
4. Meet with appropriate chairs and state leadership to create meeting agendas.			
5. Provide all meeting materials and supplies to support the meeting.			
6. Facilitate group discussion at all committee meetings.			
7. Document discussion in formal meeting minutes and notes for distribution to participants.			
8. Communicate with committee members regarding meeting location, schedule, agenda items, reminders, and other necessary information.	\$	\$	\$
9. Create annual report summarizing each committee's accomplishments and/or recommendations.	\$	\$	\$
10. Provide reports to Ohio Department of Education as required.	\$	\$	\$
<u>TOTAL COST PER FISCAL YEAR</u>	\$	\$	\$

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/searchEODReporting.aspx">http://eodreporting.oit.ohio.gov/searchEODReporting.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>
Early Childhood Ohio	<a href="http://www.earlychildhoodohio.org">http://www.earlychildhoodohio.org</a>
Ohio Department of Education	<a href="http://www.education.ohio.gov">http://www.education.ohio.gov</a>
Ohio Department of Job and Family Services	<a href="http://www.jfs.ohio.gov">http://www.jfs.ohio.gov</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: Secretary of State Certification, Affirmative Action, 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.