

REQUEST FOR PROPOSALS

ADDENDUM #2

ISSUED: September 24, 2012

**RFP NUMBER: CSP902913
INDEX NUMBER: EDU098**

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

Cross-Project Evaluation of Ohio Mathematics and Science Partnership (OMSP) Program

Attached is page 1 to this Request for Proposal (RFP). Remove the corresponding page from the existing RFP and replace with the attached.

Reason for Addendum. This addendum is issued in response to offeror inquiries.

**PROPOSAL DUE DATE: October 10, 2012 by 1:00 p.m.
OPENING LOCATION: Department of Administrative Services
General Services Bid Desk
4200 Surface Road
Columbus, Ohio 43228-1395**

REQUEST FOR PROPOSALS

***RFP NUMBER: CSP902913**
INDEX NUMBER: EDU098
UNSPSC CATEGORY: 601000000, 86000000, 93100000

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

Cross-Project Evaluation of Ohio Mathematics and Science Partnership (OMSP) Program

RFP ISSUED: September 10, 2012
INQUIRY PERIOD BEGINS: September 10, 2012
INQUIRY PERIOD ENDS: September 28, 2012 at 8:00 a.m.
PROPOSAL DUE DATE: October 10, 2012 by 1:00 p.m.

Proposals received after the due date and time will not be evaluated.

**OPENING LOCATION: Department of Administrative Services
Office of Procurement Services
ATTN: Bid Desk
4200 Surface Rd.
Columbus, OH 43228-1395**

Offerors must note that all proposals and other material submitted will become the property of the state and may be returned only at the state's option. Proprietary information should not be included in a proposal or supporting materials because the state will have the right to use any materials or ideas submitted in any proposal without compensation to the offeror. Additionally, all proposals will be open to the public after the award of the contract has been posted on the State Procurement Web site. Refer to the Ohio Administrative Code, Section 123:5-1-08 (E).

***This RFP consists of five (5) parts and eleven (11) attachments, totaling 58 consecutively numbered pages. Please verify that you have a complete copy.**

obtain information relevant to criteria in this part of the RFP, which is deemed critical to not only the successful operation and management of the Project, but also the working relationship between the State and the Offeror.

FINANCIAL ABILITY. Part of the Proposal evaluation criteria is the qualifications of the Offeror which include, as a component, the Offeror's financial ability to perform the Contract. This RFP may expressly require the submission of financial statements from all Offerors in the Proposal contents attachment. If the Proposal contents attachment does not make this an expressed requirement, DAS may still insist that an Offeror submit audited financial statements for up to the past three (3) years if DAS is concerned that an Offeror may not have the financial ability to carry out the Contract.

In evaluating an Offeror's financial ability, the weight DAS assigns, if any, to that financial ability will depend on whether the Offeror's financial position is adequate or inadequate. That is, if the Offeror's financial ability is adequate, the value assigned to the Offeror's relative financial ability in relation to other Offerors may or may not be significant, depending on the nature of the Work. If DAS believes the Offeror's financial ability is not adequate, DAS may reject the Proposal despite its other merits.

DAS will decide which phases are necessary. DAS has the right to eliminate or add phases at any time in the evaluation process.

To maintain fairness in the evaluation process, all information sought by DAS will be obtained in a manner such that no Offeror is provided an unfair competitive advantage.

MANDATORY REQUIREMENTS. The following Table 1 contains items that are considered minimum requirements for this RFP.

Determining the Offeror's ability to meet the minimum requirements is the first step of the DAS evaluation process. The Offeror must demonstrate, to DAS, it meets all minimum requirements listed in the Mandatory Requirements section (Table 1). The Offeror's response to the minimum requirements must be clearly labeled "Mandatory Requirements" and collectively contained in Tab 1 of the Offeror's Proposal in the "Cover Letter and Mandatory Requirements" section. (Refer to Attachment Two of the RFP document for additional instructions.)

DAS will evaluate Tab 1, alone, to determine whether the Proposal meets all Mandatory Requirements. If the information contained in Tab 1 does not clearly meet every Mandatory Requirement, the Proposal may be disqualified by DAS and DAS may not evaluate any other portion of the Proposal.

*TABLE 1 - MANDATORY PROPOSAL REQUIREMENTS

There are no mandatory requirements for this RFP.

PROPOSAL EVALUATION CRITERIA. If the Offeror provides sufficient information to DAS, in Tab 1, of its proposal, demonstrating it meets the Mandatory Requirements, the Offeror's Proposal will be included in the next part of the evaluation process which involves the scoring of the Proposal Technical Requirements, followed by the scoring of the Cost Proposals. In the Proposal evaluation phase, DAS rates the Proposals submitted in response to this RFP 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.

TABLE 2 - SCORING BREAKDOWN

Criteria	Maximum Allowable Points
Proposal Technical Requirements	1,100 Points
Proposal Cost	275 Points
Total	1,375 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
---------------------------	-----------------	---------------------------	-------------------	-----------------------------	--------------------

*Indicates clarification that there are no mandatory requirements.

ATTACHMENT ONE: WORK REQUIREMENTS AND SPECIAL PROVISIONS
PART ONE: WORK REQUIREMENTS

This attachment describes the Project and what the Contractor must do to complete the Project satisfactorily. It also describes what the Offeror must deliver as part of the completed Project (the "Deliverables"), and it gives a detailed description of the Project's schedule.

SCOPE OF WORK.

*I. DEFINITIONS.

1. Agency. The Ohio Department of Education (ODE).
2. Calendar Year. January 1 through December 31 of the respective year.
3. Contract Administrator. The State representative responsible for contract administration.
4. Contractor. A successful Offeror who shall perform the duties specified in the Contract.
5. DAS. The Department of Administrative Services.
6. OMSP. Ohio Mathematics and Science Partnership.
7. ODE. The Ohio Department of Education.
8. Offeror. A company or individual submitting a Proposal in response to this RFP.
9. PD. Professional Development.
10. RFP. That certain Request for Proposal for the ODE, issued by the state of Ohio, through the Department of Administrative Services, Office of Procurement Services, including any addenda, which by its terms is an integral part of this Contract.
11. State. Refers to the state of Ohio, through any of its departments, agencies, or representatives.
12. State of Ohio fiscal year. The period from July 1 of one (1) calendar year through June 30 of the following calendar year.
13. Subcontractor. Any service provider hired under contract with the Contractor to meet the requirements of this agreement.

B. RESEARCH QUESTIONS AND EVALUATION METHODS.

ODE seeks information about the following research questions:

1. How successful are each of the selected programs (Modeling Instruction Program in High School Science; INTEL Math Program for K-8 Mathematics; or other research-based programs selected by individual projects) in increasing teacher content knowledge?
2. What is the evidence of improved connections to the real world in the classroom (relevancy, inquiry, and problem-solving skills) in project schools?
3. What evidence is there of improved student achievement, particularly in areas of content identified in needs assessments submitted by projects?

Sub-questions that relate include:

- a) To what degree were various projects able to implement programs with fidelity?
- b) Is there evidence that specific programs provide a good match to specific needs and populations as identified by the projects?
- c) How have projects succeeded in maintaining a high level of teacher participation and engagement?

*Indicates correction to numbers list.

- d) What specific barriers to implementation of programs were evidenced by any of the programs and how did this impact success in meeting the goals of the program?

DATA GATHERING

ODE proposes the use of data from the following:

1. Pre and post testing of teacher content knowledge
2. Trend data on student achievement
3. Classroom observation
4. Teacher and administrator interview, survey or focus groups

C. ANALYSIS OF DATA AND REPORTS

1. Analysis.

To maintain progress reports on the pilots, ODE feels that it is essential that the data collected be analyzed in a timely manner and shared with the respective ODE project lead. For statistical data, proper analysis approaches should be used to compare the importance of all variables on the outcome and be able to analyze the reliability of any correlations.

The Offeror shall include, but not necessarily limit their response to, a description of the types of analyses that will be used on the collected data to answer the research questions posed above.

2. Updates.

While we want an objective evaluation of the OMSP project, it is the desire of the State to use any and all information available to improve the project during implementation. If we learn quickly that something is not working, we do not want to continue to pilot that aspect of the project just to collect more data showing that it is not working.

On the other hand, the State recognizes that some changes will take the entire length of the project to become evident, so lack of change in an area will not automatically require a change to the pilot with the intent to amplify an as-yet unseen change.

For the purpose of creating this ability to fine-tune the pilot projects, the State is requesting quarterly updates from the Contractor to inform the respective regional FIP specialists about the data the Contractor is collecting and the conclusions being drawn from the data analysis.

The Contractor shall include, but not necessarily limit their response to, a proposal for the appearance and contents of the quarterly updates as well as a plan for how they will negotiate changes to the projects based on these updates.

3. Reports.

The State will require annual reports and a final report covering all three years on the pilot projects for its own purposes. Additionally, the State is interested in providing parallel reports to both stakeholders and participants about the pilot projects. While the content of the State's report is clarified by the research questions posed here, the contents of a participant's or stakeholder's report is not outlined in this RFP.

The Contractor shall include, but not necessarily limit their response to, a proposal for the appearance and contents of each of the three different kinds of annual reports requested as well as a description of how the contents of the stakeholder's and participant's reports were determined.

*II. WORK PLAN.

The Offeror's Work Plan shall include the following:

1. Proposed instruments to gather data as listed above.
2. A description of data-gathering methods and instruments and a rationale for their use

*Indicates correction to numbers list.

All Offerors who seek to be considered for a contract award must submit a response that contains an affirmative statement using the language in paragraph(s) a. through n. above.

Responses to all Mandatory Requirements from Table 1 must be included in this section (Tab 1).

2. Certification. Each Proposal must include the following certification signed by the individual Offeror.

(Insert Company name) affirms they are the prime Offeror.

(Insert Company name) affirms it shall not and shall not allow others to perform work or take data outside the United States without express written authorization from DAS.

(Insert Company name) affirms that all personnel provided for the Project, who are not United States citizens, will have executed a valid I-9 form and presented valid employment authorization documents.

(Insert Company name) affirms that any small business program participants will provide necessary data to ensure program reporting and compliance.

(Insert Company name) agrees that it is a separate and independent enterprise from the state of Ohio, the Agency, and the Department of Administrative Services. *(Insert Company name)* has a full opportunity to find other business and has

made an investment in its business. Moreover *(Insert Company name)* will retain sole and absolute discretion in the judgment of the manner and means of carrying out its obligations and activities under the Contract. This Contract is not to be construed as creating any joint employment relationship between *(Insert Company name)* or any of the personnel provided by *(Insert Company name)*, the Agency, or the Department of Administrative Services.

(Insert Company name) affirms that the individuals supplied under the Contract are either: (1) employees of *(Insert Company name)* with *(Insert Company name)* withholding all appropriate taxes, deductions, or contributions required under law; or (2) independent contractors to *(Insert Company name)*.

If the Offeror's personnel are independent Contractors to the Offeror, the certification must also contain the following sentence:

(Insert Company name) affirms that it has obtained a written acknowledgement from its independent Contractors that they are separate and independent enterprises from the state of Ohio and the Department of Administrative Services and the Agency for all purposes including the application of the Fair Labor Standards Act, Social Security Act, Federal Unemployment Tax Act, Federal Insurance Contributions Act, the provisions of the Internal Revenue Code, Ohio tax law, worker's compensation law and unemployment insurance law.

3. Signed Contracts. The Offeror must provide two (2) originally signed, blue ink copies of the included Contract, Attachment Four. Offeror must complete, sign and date both copies of the Contract and include it with their Proposal. (Attachment Four).
4. Offeror Profile and Prior Projects. Each Proposal must include a profile of the Offeror's capability, capacity, and relevant experience working on projects similar to this Work. The profile must also include the Offeror's legal name; address; telephone number; fax number; e-mail address; home office location; date established; ownership (such as public firm, partnership, or subsidiary); firm leadership (such as corporate officers or partners); number of employees; number of employees engaged in tasks directly related to the Work; and any other background information that will help the State gauge the ability of the Offeror to fulfill the obligations of the Contract. The financial stability of the company should also be described and is considered a necessary component of this portion of the Proposal's response. This RFP includes Offeror Profile Summary Form as Attachment Five A which must be completed for the Offeror. The Offeror must use this form and fill it out completely to provide the Offeror requirement information.

The Offeror shall also provide information on the firm's background as well as evidence that it has in place the personnel, internal procedures, and any other resources required under the terms of the Contract to ensure successful performance and contract compliance. Offerors must describe current operational capacity of the organization and the Offeror's ability to absorb the additional workload resulting from this Project. Failure to recreate the form accurately to include all fields, may lead to the rejection of the Offeror's Proposal.

*The Offeror must document previous experience and expertise in providing a minimum of two (2) previous projects, similar in size and complexity, in the previous five (5) years. These projects must be of similar size, scope and nature. Details of the similarities must be included. Attachment Five B, and C must be filled out completely for each of the two (2) projects provided. The Offeror must use these forms and fill them out completely to provide the Offeror requirement information. Failure to recreate the form accurately to include all fields, may lead to the rejection of the Offeror's Proposal.

*Indicates change to number of previous projects.

The State may not be able or willing to provide the additional support the Offeror lists in this part of its Proposal. The Offeror must therefore indicate whether its request for additional support is a requirement for its performance. If any part of the list is a requirement, the State may reject the Offeror's Proposal if the State is unwilling or unable to meet the requirements.

10. Conflict of Interest Statement. Each Proposal must include a statement indicating whether the Offeror or any people that may work on the Project through the Offeror have a possible conflict of interest (e.g., employed by the State of Ohio, etc.) and, if so, the nature of that conflict. The State has the right to reject a Proposal in which a conflict is disclosed or cancel the Contract if any interest is later discovered that could give the appearance of a conflict.
11. Assumptions. The Offeror must provide a comprehensive listing of any and all of the assumptions that were made in preparing the proposal. If any assumption is unacceptable to the State, it may be cause for rejection of the Proposal. No assumptions shall be included regarding negotiation, terms and conditions, and requirements.
12. Proof of Insurance. In this section, the Offeror must provide the certificate of insurance required by the General Terms & Conditions, Attachment Three, Part Two. The policy may be written on an occurrence or claims made basis.
13. Payment Address. The Offeror must provide the address to which payments to the Offeror will be sent.
14. Contract Performance. The Offeror must complete Attachment Eight, Offeror Performance Form.
15. W-9 Form and Vendor Information Form. The Offeror must complete Federal Form W-9, Request for Taxpayer Identification Number and Certification form and the Vendor Information Form (OBM-5657) in their entirety. At least one (1) original of each form (signed in blue ink) must be submitted in the "original" copy of the Proposal. All other copies of the Proposal may contain duplicates of these completed forms. If a subsidiary company is involved, Offerors must have an original W-9 and OBM-5657 for both the parent and subsidiary companies. These documents and directions can be found on the OBM Web site under the heading "Vendor Forms" at <http://www.ohiosharedservices.ohio.gov/Vendors.aspx>
16. Affirmative Action. Before a contract can be awarded or renewed, an Affirmative Action Program Verification Form must be completed using:

<http://das.ohio.gov/Divisions/EqualOpportunity/AffirmativeActionProgramVerification/tabid/133/Default.aspx>.

Approved Affirmative Action Plans can be found by going to the Equal Opportunity Department's Web site:

<http://eodreporting.oit.ohio.gov/searchAffirmativeAction.aspx>

Copies of approved Affirmative Action plans shall be supplied by the Offeror as part of its Proposal or inclusion of an attestation to the fact that the Offeror has completed the process and is pending approval by the EOD office.

17. Banning the Expenditure of Public Funds on Offshore Services. The Offeror must complete the Contractor/Subcontractor Affirmation and Disclosure form (Attachment Nine) to abide with Executive Order 2011-12K issued by the Governor of Ohio, affirming no services of the Contractor or its subcontractors under this Contract will be performed outside the United States.

During the performance of this Contract, the Offeror must not change the location(s) of the country where the services are performed, change the location(s) of the country where the data are maintained, or made available without express written authorization of the Department of Administrative Services.

18. Cost Summary Form. The Cost Summary Form (Attachment Ten) must be submitted with the Offeror's Proposal. The Offeror's total cost for the entire Project must be represented as the firm fixed price, for a not-to-exceed fiscal year cost. Offerors shall provide a comprehensive cost analysis; this cost must include all ancillary costs. All costs for furnishing the services must be included in the Cost Proposals as requested. No mention of or reference to, the Cost Proposals may be made in responses to the general, technical, performance, or support requirements of this RFP.

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. The awarded contractor must hold the accepted prices and/or costs for the entire contract period. No price change shall be effective without prior written consent from DAS, OPS.

NOTE: Offeror's should ensure Cost Proposals are submitted separately from the Technical Proposals, as indicated the Proposal Submittal paragraph of this RFP (see Part Three). This information should not be included in the Technical Proposal.

The State shall not be liable for any costs the Offeror does not identify in its Proposal.

*Indicates removal of Declaration Regarding Material Assistance/Non-assistance to a Terrorist Organization (DMA).