



Office of
Procurement Services
Service · Support · Solutions

REQUEST FOR PROPOSAL

RFP NUMBER: CSP905413
INDEX NUMBER: DVS002
UNSPSC CATEGORY: 80141500

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

Examination of Veterans Services

OBJECTIVE: The purpose of the study is to collect, among a select sampling of the 50 states, functional models that examine three key categories: Veterans Services Offices, Funding and Power of Attorney Authority for claims assistance. ODVS can then consider these different models in the context of veterans' services in Ohio and the challenges ODVS has in effectively providing those services. The awarded contractor shall collect and analyze data for use by the ODVS.

RFP ISSUED: January 25, 2013
INQUIRY PERIOD BEGINS: January 25, 2013
INQUIRY PERIOD ENDS: February 15, 2013 at 8:00 AM
PROPOSAL DUE DATE: February 25, 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.

Offeror Name and Address: _____ _____ _____ _____ E-Mail Address: _____ Phone Number: () _____ - _____, Ext. _____	Name/Title: _____ _____ 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.
---	--

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
Supplement A: Ohio Department of Veterans Services Logo	

RFP GLOSSARY OF TERMS

AA:	Affirmative Action
Contractor:	Vendor after Award
CSP:	Competitive Sealed Proposal
CVSC:	County Veterans Service Commissioners
CVSO:	County Veterans Services Office
DAS:	Department of Administrative Services
EOD:	Equal Opportunity Division
FEI:	Federal Employer Identification
GOVA :	Governor's Office of Veterans' Affairs
Mandatory:	Must, Will, Shall
NSO:	National Service Organization
OAC:	Ohio Administrative Code
OAKS:	Ohio Administrative Knowledge System (Ohio's Accounting System)
OBG:	Ohio Business Gateway
ODVS:	Ohio Department of Veterans Services
Offeror:	Vendor Submitting Proposal
OPS:	Office of Procurement Services
ORC:	Ohio Revised Code
POA :	Power of Attorney
RFP:	Request for Proposal
SOS:	Secretary of State
UNSPSC:	The United Nations Standard Products and Services Code
VA:	U.S. Department of Veterans Affairs
VSC:	Veterans Service Commissioners

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 Veterans Services (the Agency), is soliciting competitive sealed proposals (Proposals) for Examination of Veterans Services. 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 July 31, 2013. 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 one (1) year 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 Ohio Department of Veteran Services, ODVS, has been a cabinet level agency since 2008. Since its inception, ODVS has taken considerable measures to connect veterans and their families to the benefits and services they have earned. Great effort has been pursued to evaluate what should be done to improve veterans' services in Ohio. As such, a multi-step approach was taken by ODVS in early 2011. The first step was to review current practices in light of conventional management principles and to visit, first-hand, each of the County Veterans Services Offices (CVSOs) while strengthening relations with appropriate Federal agencies—primarily the U.S. Department of Veterans Affairs (VA). A new communications officer was appointed, and ODVS assisted the counties to modernize, streamline, coordinate and disseminate communications. A unified message was disseminated throughout the state and in some VA publications and the Department established a visual identity through modern modes of communication to include the creation of a Department logo (Supplement A). The positive impact of these changes combined with improvements in training given by the Department to the CVSOs resulted in a more-than-doubling of the rate of increase of connecting veterans to service-connected disability compensation in 2011. The previous rate of increase had remained relatively unchanged for years. The ODVS Director and Assistant Director made personal visits to all eighty-eight CVSOs, most of which had never been visited by the state, and these visits laid the basis for the establishment of three major "next steps":

- A. The inauguration of a survey, supported by professionals from the Department of Public Safety (DPS) of the veterans' claims process for service-connected disability compensation.
- B. The inauguration of a strategic review of ODVS and CVSO practices and subsequent steps to establish conformity and uniformity of operations (while taking into account differing county demographics) and improved training and feedback from CVSOs and constituents (feedback is augmented, in part, by the Department's redesigned web site <http://dvs.ohio.gov>.)
- C. A determination that an independent study was needed to assess best practices of other states in order to aid ODVS' efforts to determine what practices related to veterans services in Ohio or its counties should be maintained or altered. The expertise needed for this assessment is beyond the resources of ODVS. This RFP is for the independent study.

The purpose of the study is to collect, among a select sampling of the 50 states, functional models that examine three key categories listed below. ODVS can then consider these different models in the context of veterans' services in Ohio and the challenges ODVS has in effectively providing those services. This study is for data collection and data analysis only. The state of Ohio has dispensed benefits to its military veterans since the time of the Civil War. These benefits, funded through various sources including Federal, State and County, have been administered in different ways. Although veterans may apply directly to the (VA) or through a National Service Organization (NSO) for benefits, in most cases the "front door" for veterans' benefits in Ohio is at one of the 88 County Veterans Service Offices (CVSOs) or one of the Veterans Service Organizations (SOs e.g. VFW, American Legion, etc).

Veterans Service Offices. In Ohio, leadership of the 88 CVSOs is made by judicial appointment among representative candidates from five congressionally chartered veterans National Service Organizations (NSOs), as listed in section 5901.02 of the Ohio Revised Code (ORC). Selected veterans comprise the CVSO executive committee and are known as County Veterans Service Commissioners (CVSCs) who must represent one of the (private) NSOs. Until three years ago, when ODVS was established as a cabinet-level department, oversight by the state of the CVSOs had been minimal, and rested in a small administrative office in the Governor's staff, namely The Governor's Office of Veterans' Affairs (GOVA).

The aging of Ohio's veteran population presents an ongoing challenge to finding eligible and qualified veterans to fill CVSC positions.

Funding. Many of the CVSOs are further hampered in their efforts to provide adequate service to their veterans because of the marked disparity in funding available to them. Total combined value of all funding available to CVSOs in 2011 was \$121 million. However, for a number of reasons, only \$56 million in county funds was spent on veterans' services throughout the state. Funding available to the largest counties often goes unused for veterans' services while funding available for veterans services in the counties with the smallest populations is absolutely inadequate to provide even the most basic services.

Power of Attorney authority for claims assistance. Once a veterans' VA Compensation claim leaves the county, either by the veteran themselves or submitted by a CVSO, it goes to the regional VA Processing Center (most Ohio claims travel to the VA Regional Office in Cleveland for processing.) When a claim is submitted, the veteran is able to designate a Power of Attorney (POA) to formally submit the claim and follow the claim through any appeals process. Currently, Ohio POAs are limited to a small number of NSOs. POAs serve as the claims' last line of defense and serve to review the claim one final time before analysis, adjudication and decision by a federal VA Claims Officer. It would be useful to be aware of models in other states that differ from Ohio's (e.g. those that may involve contract or state-run POAs). Currently, POAs are most often representatives of the same SO from which a CVSO is affiliated.

- 1.3.1 OBJECTIVES. DAS has the following objective 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:

To provide ODVS an assortment of models for the provision of veterans' services from other comparable states; states with similar demographics as Ohio and states that outperform Ohio in the three categories listed below regardless of their size, location or demographics. A major effort in veterans' services is the receipt and processing of claims for benefits (see item C, above) issues especially in regard to effectiveness of the organization of veterans services, the function of the POAs and the funding of veterans services. The study should identify best practices around the US in regard to NSOs involvement in VA claims processing. These models will be examined by ODVS in its efforts to improve veterans' services in Ohio at the state and county level.

The three areas of veterans' service apropos to this study are:

- A. To examine structure and function of veterans service offices at the state level and below (county, regional, local, rural—as the case may be) to include the process of appointing officials (e. g. veterans commissioners/executive directors).
- B. Examination of funding both for state and local/county veterans services
- C. To examine the function and capabilities of power of attorney services for veterans' claims

1.4 SCOPE OF WORK

Areas for study are listed in order of priority.

A. County Veterans Service Offices:

In Ohio, leadership of a CVSO is provided by an Executive Director/or Senior Service Officer and by a board of Veterans Service Commissioners (VSCs). In 87 counties, the board of VSCs maintains five veterans who must represent one of the (private) NSOs that are listed in section 5901.02 of the Ohio Revised Code (ORC). The county VSCs hire the executive director.

Identify states that have a CVSC, and of those states questions for research may include, at a minimum:

1. What are the responsibilities of Executive Directors and CVSCs in other states?
2. What are the minimum standards required for the position of a CVSO executive director?
3. What is the demographic profile of a CVSC in other states?
4. How long does the average CVSC serve in other states?
5. Do other states have CVSC positions filled by veterans outside of the five congressionally chartered NSOs in title Ohio Revised Code 59? If so, how are those veteran affiliations qualified (i.e. what other SNOs are represented?)

Questions for research shall be mutually agreed upon by the awarded Contractor and DVS.

B. Funding:

Though funding for county operations is often generous and based on .5 mil of appraised real estate value in each of the respective 88 counties, there continues to be regional disparity among counties with varying levels of property value from which to draw from. Total combined value of all funding available to CVSCs across Ohio in 2011 was \$121million. However, for a number of reasons, only \$56 million in county funds was spent on veterans' services throughout the state. The rest was not collected, budgeted or was returned to the county treasury for use for other county programs.

How could Ohio's funding model benefit veterans in all 88 counties more effectively? Questions for research may include, at a minimum:

1. What are the funding models for other states veterans' benefits? (regardless of population demographics)
2. Of the states comparable to Ohio, what are their revenues/funding models?
3. How many states have an established 'Veteran's Trust Fund'?

Questions for research shall be mutually agreed upon by the awarded Contractor and DVS.

C. Power of Attorney Authority:

It would be useful to be aware of models in other states that differ from Ohio's (e.g. those that may involve contract or state-run POAs).

Questions for research:

1. How many states have state run POA offices/contracts?
 - a. Do those states rely solely on state employees as POAs?
 - b. Do those states rely solely on NSOs representatives to serve as POAs?
 - c. How many states operate with a hybrid of state POAs and NSO POAs?
2. What are the staffing models of a POA office in other states?
 - a. How many office staff to POA case management staff?
 - b. What are their training requirements?
3. How many appeals cases do such POA offices handle at the state and national level?
4. How many POA offices have representation in DC at the Bureau of Veteran Appeals?
5. What is the funding allocation for a POA office in other states?
 - a. What are the average salary/benefits for POA office employees?
6. What is the POA staff size to veteran population ratio in such states?

1.4.1 REPORTS.

- A. The Contractor shall submit quarterly status reports to the agency project representative by the 10th of the month following quarter end.
- B. The final report is due July 31, 2013. A draft final report shall be submitted to the agency project representative by June 30, 2013. The Contractor shall submit both a hard copy report and an electronic file of the report.

1.4.2 WORK PLAN. The Offeror shall clearly describe how it will perform the research, specifically the collection and analysis of the data. Some areas to address:

Proposed sample size
Proposed research questions
Method of data collection
Plan for analysis of data

1.4.3 CONTRACTOR RESPONSIBILITIES. The Contractor must meet all RFP requirements and perform Work as defined 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 Not applicable for this RFP.

2.2 TABLE 1 - MANDATORY PROPOSAL REQUIREMENTS

Not applicable to 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	612 Points
Proposal Cost	153 Points
Total	765 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
---------------------------	-------------------	---------------------	-----------------------------

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
Offeror Profile			
1. Each Proposal must include a profile of the Offeror's history, capability, capacity, and relevant experience working on projects similar to this Work. (Complete all areas of Form 5.2.3).	8		
2. The Offeror demonstrates it has sufficient resources to meet the requirements and deadline of the Project.	4		
Offeror Prior Projects			
1. The Offeror must document, at a minimum, three (3) previous jobs similar to this project within the last five (5) years and provide details of similarities (Form 5.2.4).	6		
2. The Offeror has documented experience working with veterans organizations and/or veterans services.	5		
3. The Offeror has documented experience conducting state by state analysis.	5		
Staffing Plan			
1. The Offeror must name a Project Manager that has managed a project of similar size and scope within the last five (5) years and provide documentation for the project.	6		
2. The Offeror must submit Offeror's Candidate Forms for each key member of the work team which includes candidate's education, training, and qualifications (Forms 5.2.5 and 5.2.6).	4		
Work Plan. Offeror's Work Plan must include the following:			
1. Proposed methodologies for collecting data including sampling techniques for CSVOs.	4		
2. Proposed plan for data analysis for CSVOs.	3		
3. Proposed methodologies for collecting data including sampling techniques on Funding.	4		
4. Proposed plan for data analysis for Funding.	3		
5. Proposed methodologies for collecting data including sampling techniques on Power of Attorney Authority.	4		
6. Proposed plan for data analysis for Power of Attorney Authority.	3		
7. Project timeline with activities, showing that Contractor has the capacity to complete the evaluation within the timeframe of the Contract.	6		
8. Discussion of any anticipated difficulties and a method to overcome such difficulties.	3		

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.



Office of
Procurement Services
Service · Support · Solutions

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

Fiscal Office/Accounts Payable
Ohio Department of Veteran Services
Attn: M. Liptay
3416 Columbus Avenue
Sandusky, Ohio 44870

Examination of Veteran Services
CSP905413
UNSPSC CATEGORY CODE: 80141500
BUDGET: \$100,000.00

OFFEROR _____

The subjects for the research and analysis are listed by priority. The budget given above is firm. Offerors must respond whether it will examine all subjects for the budget given, or respond only for selected subjects, in order of priority.

Description	Cost
County Veterans Service Offices: Research and Analysis	\$
Funding: Research and Analysis	\$
Power of Attorney authority for claims assistance: Research and Analysis	\$
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	http://eodreporting.oit.ohio.gov/searchEODReporting.aspx
Office of Budget and Management	http://obm.ohio.gov/LandingPages/Vendor/default.aspx
Office of Procurement Services	http://procure.ohio.gov/proc/index.asp
Ohio Shared Services	http://www.ohiosharedservices.ohio.gov/Home.aspx
Ohio Business Gateway	http://business.ohio.gov/
Ohio Secretary of State	http://www.sos.state.oh.us/SOS/Businesses.aspx
Ohio Revised Code	http://codes.ohio.gov/orc
Ohio Department of Veterans Services	http://dvs.ohio.gov

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. 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.

SUPPLEMENT A
OHIO DEPARTMENT OF VETERANS SERVICES LOGO

