



Department of Job and Family Services

**Ohio Department of Job and Family Services
Request for Letterhead Bids (RLB)
Employability Skills Training Curriculum Development
RLB#: R-1011-15-8054**

I. Purpose

The Ohio Department of Job and Family Services (ODJFS), Office of Workforce Development (OWD) is soliciting bids to identify a Minority Business Enterprise (MBE) vendor who will develop an employability skills training curriculum to accelerate the successful re-employment of dislocated workers and the long term unemployed. This Request for Letterhead Bids (RLB) document is released by ODJFS, and the subsequent contract expected to result from this RLB process will be a contract between the vendor and ODJFS.

ODJFS, OWD will designate a staff member as the ODJFS Contract Manager to provide on-going supervision of the contractor selected through this RLB. The contract period for this project is expected to run from approximately July 12, 2010, to December 31, 2010. No extensions or renewals are planned for the contract expected to result from this RLB.

ODJFS will only accept proposals from MBE vendors that demonstrate their capability of providing services as described in this RLB. For the purpose of this RLB, the term “vendor” shall be defined as an organization interested in this opportunity. The term “contractor” is used in reference to the successful vendor selected through this RLB.

ODJFS is under no obligation to enter into a contract with any vendor as a result of this solicitation, if, in the opinion of ODJFS, none of the proposals are responsive to the objectives and needs of the Department. ODJFS reserves the right to not select any vendor should ODJFS decide not to proceed. Changes in this RLB of a material nature will be provided on the agency website. All vendors are responsible for obtaining any such changes without further notice by ODJFS.

II. Time and Date of Submission

Organizations, companies, firms, or individuals who are interested in submitting letterhead bids must make their submission not later than **10:00 a.m. Eastern (local) Time on Monday, June 7, 2010**. Faxes will not be accepted. Bids must be addressed to:

**Office of Contracts & Acquisitions
Ohio Department of Job and Family Services
30 East Broad Street, 31st Floor
Columbus, Ohio 43215-3414
ATTN: RFP/RLB Unit**

For hand delivery on the due date, vendors are to allow sufficient time for downtown parking considerations, as well as for security checks at both the lobby of the Rhodes State Office Tower (address as stated above) and again on the 31st Floor. All bids received on the due date will be accepted by the Office of Contracts and Acquisitions on the 31st Floor of the Rhodes Tower. **ODJFS is not responsible for any bids delivered to any address other than the address provided above.**

All submissions must be received, complete, by mail or hand delivery by the above date and time. Materials received after the submission deadline date will not be added to previous submissions, nor be considered. No

confirmations of mailed bids received can be provided. Submission of a bid indicates acceptance by the vendor of the conditions contained in this RLB, unless clearly and specifically noted in the bid submitted and confirmed in the contract between ODJFS and the vendor selected.

III. Anticipated Procurement and Project Timetable

05/13/2010	ODJFS Releases RLB to Potential Vendors on the DAS and ODJFS Websites; Q & A Period Opens - Vendors may submit inquiries for RLB clarification
05/21/2010	Vendor Q & A Period closes, 8:00 a.m. for inquiries for RLB clarification - No further inquiries for RLB clarification will be accepted
05/25/2010	ODJFS posts Final Vendor Question & Answer Document on ODJFS website
06/07/2010	Deadline for Vendors to Submit Proposals to ODJFS (10:00 A.M., local time)
06/18/2010	ODJFS Issues Vendor Selection Notification Letter (estimated)
07/12/2010	Contract effective date/Purchase Order approval – work may not begin until a state Purchase Order has been fully approved by OBM. (ESTIMATED DATE)
12/31/2010	All project work must be completed.

ODJFS reserves the right to revise this schedule in the best interest of the State of Ohio and/or to comply with the State of Ohio procurement procedures and regulations and after providing reasonable notice.

According to requirements of Ohio Revised Code (ORC) 126.07, ODJFS contracts are not valid and enforceable until the Office of Budget and Management (OBM) certifies the availability of appropriate funding, as indicated by the approval of the Purchase Order (P.O.). The selected vendor may neither perform work nor submit an invoice for payment for work performed for this project for any time period prior to the P.O. approval date. The ODJFS Contract Manager will notify the selected vendor when the requirements of ORC Section 126.07 have been met.

IV. Internet Question & Answer Period; RLB Clarification Opportunity

Potential vendors may ask clarifying questions regarding this RLB via the Internet during the Question and Answer (Q & A) Period as outlined in Section III. Anticipated Procurement Timetable. To ask a question, potential vendors must use the following Internet process:

- * Access the ODJFS Web Page at <http://jfs.ohio.gov>;
- * Select “About ODJFS” on the front page;
- * Select “Doing Business with ODJFS” listed on the left column of the page;
- * Select “Requests for Proposals, Letterhead Solicitations, and Other Invitations;”
- * Select RLB Number [R-1011-15-8054](#);
- * Follow the link to the dedicated web page;
- * Select “Submit Inquiry” near the bottom of the web page; and
- * Follow the instructions and guidelines as follows to send an e-mail question.

Questions to this RLB must reference the relevant part of this RLB, the heading for the provision under question, and the number and/or section of the RLB where the provision can be found. The potential vendor must also include his or her name, the company name, and business phone number. ODJFS may, at its option, disregard any questions which do not appropriately reference an RLB provision or location, or which do not include an identification for the originator of the question. ODJFS will not respond to any questions submitted after **8:00 a.m.** on the date that the Q & A period closes.

ODJFS responses to all questions asked via the Internet will be posted on the Internet web site dedicated to this RLB, for reference by all potential vendors. Potential vendors will not receive personalized or individual e-mail responses. Clarifying questions asked and ODJFS responses to them comprise the “ODJFS Question and Answer Document” for this RLB; when possible, ODJFS may post an interim Q & A Document as well as the final version. Vendor proposals in response to this RLB are to take into account any information communicated by ODJFS in the Final Q & A Document for the RLB. **It is the responsibility of all potential vendors to check this site on a regular basis for responses to questions, as well as for any amendments or other pertinent information regarding any RLB.**

Accessibility to the ODJFS Q & A Document will be clearly identified on the web site dedicated to this RLB, **once that document is made available.**

IMPORTANT: Requests from potential vendors for copies of previous RLBs, past vendor proposals, score sheets or contracts for this or similar past projects, are Public Records Requests (PRRs), and are not clarification questions regarding the present RLB. PRRs, submitted in accordance with directions provided in Section XVI. Communication Prohibitions, will be honored. The posted time frames for ODJFS responses to Internet or faxed questions for RLB clarification do not apply to PRRs.

Requirements under a current project may or may not be required by ODJFS under any future contract, and so may not be useful information for vendors who choose to respond to the RLB; therefore, vendors are to base their RLB responses, and the details and costs of their proposed projects, on the requirements and performance expectations established in the RLB and, if applicable, in the Q&A document, NOT on details of a current or past related contract. If vendors ask questions about existing or past contracts using the Internet Q & A process, ODJFS will use its discretion in deciding whether to provide answers.

ODJFS will only answer those questions submitted within the established time period for the Vendor Q & A process (see Section III. Anticipated Procurement Timetable, above), and which pertain to issues of RLB clarity, and which are not requests for public records. ODJFS is under no obligation to acknowledge questions submitted through the Q & A process if those questions are not in accordance with these instructions.

V. Qualifications

In order to be considered for the project described in this RLB, ODJFS requires that interested vendors must meet, at minimum, all the following qualification requirements:

A. Mandatory Vendor Qualifications

1. ODJFS will consider proposals from vendors who:
 - a. Are certified as a Minority Business Enterprise (MBE);
 - b. Have at least five (5) years of workforce development experience;
 - c. Have at least five (5) years experience in curriculum development;
2. ODJFS will only consider proposals from vendors who have assigned both, a project manager and a curriculum development specialist. However, if one (1) individual has the knowledge and skill sets necessary for both roles as outlined in this RLB, the vendor may submit one resource to perform the services of a project manager and a curriculum development specialist. (Additional required experience and capabilities of these key personnel are outlined in Section V.C., Staff Experience and Capabilities.)

3. Proposals must be received by the deadline as specified in this RLB.
4. Costs Proposals must be in a separate, appropriately labeled, sealed envelope, titled Cost Proposal.
5. Proposal must include all required affirmative statements and certifications, signed by the vendor's responsible representative, as described in this RLB.
6. Vendors must certify that they are not excluded from entering into a contract with ODJFS, due to restrictions related to the federal debarment list, unfair labor findings, or R.C. § 9.24.

Vendors which do not meet all the above experience and qualifications will be disqualified from further consideration for award.

B. Organizational Experience and Capabilities

In order to be considered for the project described in this RLB, ODJFS requires that interested vendors provide the following:

1. Narrative specifically describing the vendor's experience in curriculum development and workforce training.
2. Narrative describing at least two, but no more than four, similar sized projects completed in the past five years that demonstrate expertise necessary to successfully accomplish this project;
3. Names and contact information for at least three entities for which the vendor has performed similar large scale projects in the past five years; and
4. Letters of support from, at a minimum, three (3) current or previous employers or customers regarding their experience collaborating with the vendor on a project.

C. Staff Experience and Capabilities

The vendor must demonstrate significant expertise by assigning staff to key leadership roles for this project. Key positions will require profiles and resumes. The vendor must, at minimum:

1. Identify, by position and by name, those staff it considers key to the project's success (at a minimum, key staff identified must include a project manager and curriculum development specialist).
2. Include resume(s) and written summaries of the education and experience of the project manager, curriculum development specialist and any additional key staff expected to work on the project (including any subcontractors).
3. Assign a project manager, who at a minimum:
 - a. Is or shall be Ohio-based
 - b. Has at least two (2) years experience in workforce training program development
 - c. Has at least two (2) years of general management experience including operational, administrative and budget management
 - d. Has at least a bachelor's degree
4. Assign a curriculum development specialist, who at a minimum:
 - a. Is or shall be Ohio-based
 - b. Has at least five (5) years experience in curriculum development
 - c. Has at least three (3) years experience in workforce development

Please Note: Vendors may offer one person to perform both project manager and curriculum development specialist roles as long as that one (1) individual meets all of the necessary requirements for both positions as stated with in this RLB.

Sensitive Personal Information:

Important: It is the affirmative responsibility of the vendor submitting a proposal to remove all personal confidential information (such as home addresses and social security numbers) of vendor staff and/or of any subcontractor and subcontractor staff from resumes or any other part of the proposal package. Following submission to ODJFS, all proposals submitted become part of the public record. ODJFS reserves the right to disqualify any vendor whose proposal is found to contain such prohibited personal information.

VI. Scope of Work

The workforce investment system was designed to meet the employment and training needs of those individuals most at risk of not becoming self-sufficient. It focuses on connecting employers with skilled workers, and connecting workers with good jobs. Given the current economic environment, the task of connecting workers with good jobs has become a challenge.

Dislocated workers and those who have experienced long term unemployment face particularly difficult challenges. They are faced with the reality that they must take charge of their employment future. They quickly learn that finding a job is a job and many face barriers to employability.

Employability skills are those basic skills necessary for getting, keeping, and doing well on a job. These are the skills, attitudes and actions that enable workers to get along with their fellow workers and supervisors and to make sound, critical decisions. Unlike occupational or technical skills, employability skills are generic in nature rather than job specific and cut across all industry types and business sizes.

The purpose of this Request for Letterhead Bids is to secure the services of one (1) vendor to develop an employability skills training curriculum tailored to the specific needs and challenges of these workers that can be replicated statewide and therefore increase the marketability of laid off workers across Ohio.

VII. Specifications of Deliverables

The contracted services shall include, but may not be limited to, the following:

A. Deliverable: Develop an employability and re-employment skills training curriculum for dislocated and long term unemployed workers. The Curriculum will:

- be based on adult education principles
- incorporate best practices in the delivery of employability skills training
- reflect the latest research and cover the most up-to-date information on employability training including career exploration and planning and job search techniques
- provide high quality materials for use

This curriculum must be designed by the contractor so that upon completing a training program that employs the curriculum, job seekers will be able to:

- match their employment goals, skills, education and experience to appropriate occupations
- write resumes and cover letters that communicate their skills, education and experience in relation to their desired employment
- know how to search for a job using ohiojobs.com and use other effective job-search techniques
- communicate their suitability for a desired position in a job interview

B. Deliverable: Develop an Instructor's Guide to support delivery of the curriculum.

- The instructor's guide will use a standard format that contains learning modules with the module goal, performance objective, class time, materials, equipment, and handouts.

VIII. Vendor Compensation

On the Cost Proposal Form (provided as Attachment E to this RLB), vendors are to propose their firm, fixed, all-inclusive cost for each deliverable. The proposed prices for each deliverable are to represent the entire cost the vendor offers for the full and successful completion of that deliverable. The sum of the proposed cost of all deliverables to be performed under the resulting contract (including any renewal periods), will be the vendor's maximum total cost for successful completion of the work described in this RLB.

Vendors are to use their business expertise in pricing the work described in this RLB, taking into consideration any intervening steps or activities that must be performed in order to complete the work, and offer their costs accordingly, even if ODJFS does not explicitly identify those intervening activities in this RLB. No separate travel expenses or any other type of expenses will be paid under the contract to result from this RLB.

The total RLB award for a single proposal will be for the full duration of the project, from the award date through the termination date. The RLB award will strictly correspond with the approved budget.

Compensation will be made monthly via the submission of invoices. Providers must submit valid invoices to ODJFS within ten business days after the last business day of the previous month. Compensation will be made monthly as reimbursement for actual, allowable, expenditures incurred by the selected vendor during the billing period in accordance with the vendor's accepted budget.

IX. Format of Submission

The proposal should be no more than ten (10) pages, excluding vendor attachments. Proposals should be formatted in Times New Roman twelve (12) point type, single spaced, with one-inch margins.

To be accepted and forwarded to the ODJFS Proposal Review Team (PRT), the vendor's proposal must include a signed original and four (4) copies of a proposal, and one (1) non-rewritable CD-ROM copy of the entire original vendor's proposal, according to the format and composition details provided below.

- **Proposal.** One original and four (4) copies of the Proposal labeled: **“PROPOSAL ENCLOSED FOR CUSTOMIZED CURRICULUM DEVELOPMENT PROJECT, RLB#: R-1011-15-8054 SUBMITTED BY (VENDOR NAME AND DATE OF SUBMISSION).”**
- **One (1) non-rewritable CD-ROM** containing a copy of the entire Proposal labeled: **“CD-ROM FOR CUSTOMIZED CURRICULUM DEVELOPMENT PROJECT, RLB#: R-1011-15-8054 SUBMITTED BY (VENDOR NAME AND DATE OF SUBMISSION).”** The requested CD will be used by ODJFS for storage/archiving purposes and for Public Records Requests.

The vendor's Proposal shall contain all the information as specified for each component listed below. It is mandatory that vendor proposals be organized in the following order. Any other information thought to be relevant, but not applicable to a specific RLB section number/letter must be provided as an appendix to the proposal and so marked as an additional tab. ODJFS reserves the right not to review submitted appendices which include information or materials that were not required in the RLB. However, the proposal will be scored on the relevancy to the stated responsibilities and Quality measures, as well as the conciseness, clarity, flow, and neatness of the information presented. A proposal which is incomplete, vague, unjustifiably wordy, unclear, or poorly organized may not be successful.

All pages in the Proposal shall be sequentially numbered either per tab or for the document as a whole.

Tab 1: Forms and Certifications

Vendors submitting proposals must include a completed “Required Vendor Information and Certifications” form (provided as Attachment A to this RLB), a completed “Request for Taxpayer Identification Form W-9” (provided as Attachment B to this RLB) and the DMA form (provided as Attachment C). The vendor must provide originals of these three documents, signed in blue ink by a qualified vendor representative, in this part of the proposal packet.

Vendors are required to provide a declaration regarding material assistance to terrorist organizations or organizations that support terrorism as identified by the U.S. Department of State Terrorist Exclusion List, and as described in **Attachment C, Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Organization**. Vendors who fail to provide a signed and completed **Attachment C** risk disqualification. This form may also be accessed and printed at the Ohio Department of Public Safety, Division of Homeland Security's Website at <http://www.homelandsecurity.ohio.gov>.

Tab 2: Vendor Qualifications. The vendor proposal must include information as outlined in Section V, Qualifications, demonstrating how the vendor and its staff meet the requirements, specifically:

- Sub-Tab 2a.** Mandatory Vendor Qualifications (Section V.A.)
- Sub-Tab 2b.** Organizational Experience & Capabilities (Section V.B.)
- Sub-Tab 2c.** Staff Experience and Capabilities (Section V.C.)

Tab 3: Scope of Work and Specifications of Deliverables. The vendor proposal must include information as outlined in Section VII, Specifications of Deliverables detailing:

- Sub-Tab 3a.** Specification of Deliverables A
- Sub-Tab 3b.** Specification of Deliverables B

Tab 4: Vendor Attachments or Appendices. The vendor proposal must include all documents as outlined in Section V. including:

- Samples of at least two, but no more than four, similar sized projects completed in the past five years that demonstrate expertise necessary to successfully accomplish this project;
- Names and contact information for at least three entities for which they have performed similar large scale projects in the past five years; and
- One (1) letter of support from, at a minimum, three (3) employers regarding your experience with partnership development.

Tab 5: Vendor Cost Proposal/Budget. Applicants are to only show expenses directly related to the proposal project and include a budget narrative and justification which clearly displays how approximate costs and allocations were determined. Budget and budget item descriptions **MUST** support the objectives and program activities outlined for the project as well as any and/or all of the RLB program activities.

Applicants must attach a succinct budget narrative to explain and justify costs, and to submit it as part of the project budget. A budget narrative must explain any costs which the applicant has chosen to combine, to explain how hourly rates were achieved, or to make the connections between costs and the proposal. Applicants also need to submit the Cost Proposal Form (Attachment E).

All pages in the Proposal must be sequentially numbered, with the exception of Tab 1 contents.

X. Selection Process

All proposals will be reviewed and scored by a Proposal Review Team (PRT) comprised of ODJFS staff. Vendors should not assume that the review team members are familiar with any current or past work activities with ODJFS. Proposals containing assumptions, lack of sufficient detail, poor organization, lack of proofreading, and unnecessary self-promotional claims will be evaluated accordingly. PRT members are required to sign disclosure forms to establish that they have no personal or financial interest in the outcome of the proposal review and contractor selection process. The PRT reserves the right to reject any and all proposals, in whole or in part, received in response to this request. The PRT may waive minor defects that are not material when no prejudice will result to the rights of any vendor or to the public.

In scoring the proposals, ODJFS will score in three phases: Phase I—Initial Qualifying Criteria, Phase II—Scoring of the Vendor's Proposal, and Phase III—Consideration of Proposed Cost. The Cost Proposal will be reviewed by ODJFS. The grand total of each technically qualified vendor's Cost Proposal is divided by that vendor's final Vendor's Proposal score. This compares the cost with the quality of the Vendor's Proposal,

which will provide an average cost-per-quality point earned on the Vendor's Proposal. In addition, the PRT may, at its option, elect to conduct interviews as part of the process. All score criteria are presented in the Vendor's Proposal Score Sheet, which is provided as Attachment D to this RLB.

DISQUALIFIERS FOR PROPOSAL ERRORS:

- Any vendor's Proposal found to contain any cost information shall be disqualified from consideration. Cost information is defined as any dollar amounts which might be deemed to be indicative of the relative cost or economy of the proposed project. Information on the assets, value, or historical business volume of the vendor is NOT considered to be such prohibited cost information, and MAY be included in any vendor's proposal as information on business capacity and stability. All prohibited cost information must be submitted with the separate, sealed Cost Proposal. The Vendor's Proposal is defined as any part of the vendor's proposal (either as required by ODJFS or sent at vendor's discretion), such as work plan, resumes, letters of recommendation, letters of cooperation from any subcontractors, etc., which is not specifically identified by ODJFS as a required component of the separate, sealed Cost Proposal. Should a vendor determine to include in the vendor's proposal any documents which contain such cost information, the cost information in those documents must be made unreadable by the vendor before submission of the proposal to ODJFS. Failure to follow these instructions will result in disqualification.
- Any trade secret, proprietary, or confidential information (as defined in Section XI., E. of this RLB) found anywhere in a vendor's proposal shall result in immediate disqualification of that vendor's proposal.
- Any sensitive personal information on vendor or sub-contract staff (*e.g.*, social security numbers, addresses) must be omitted from vendor proposals, or rendered fully unreadable, or ODJFS may at its option disqualify the vendor from any consideration.

XI. RLB Process Information and Other Contractual Requirements:

A. State Contracts

Responses must list any current contracts the vendor has with State of Ohio agencies. The list must indicate the purpose of the contract, the amount of the contract, the time period covered by the contract, and the percent of the project completed. Vendors must complete a copy of the Required Vendor Information and Certifications Document (provided as **Attachment A**) to report this information, and include the completed document in the vendor's proposal as specified in **Section IX. Format of Submission**, of this RLB.

B. Interview

Vendors submitting proposals may be requested to participate in an in-depth interview as part of the evaluation process. The interview, if necessary, may include participants from ODJFS and any representatives it may appoint. ODJFS reserves the right to select from responding vendors for interviews and may not interview all vendors submitting proposals. The vendor shall bear all costs of any scheduled interview.

C. Start Work Date

The selected vendor must be able to begin work no later than seven (7) working days after the time funds are encumbered and approved by the Office of Budget & Management. The selected vendor will be notified by the ODJFS contract manager when work may begin. **Any work begun by a contractor prior to this notification will NOT be reimbursable by ODJFS.**

D. Proposal Costs

Costs incurred in the preparation of this proposal are to be borne by the vendor, and ODJFS will not contribute in any way to the costs of the preparation. Any costs associated with interviews will be borne by the vendor and will not be ODJFS' responsibility.

E. Trade Secrets Prohibition; Public Information Disclaimer

Vendors are prohibited from including any trade secret information as defined in Ohio Revised Code (ORC) 1333.61 in their proposals in response to any ODJFS RFP, Requests for Letterhead Bids (RLB) or other procurement efforts. ODJFS shall consider all proposals or similar responses voluntarily submitted in response to any ODJFS RFP, RFA, RLB, or other procurement document, to be free of trade secrets and such proposals shall, in their entirety, be made a part of the public record.

All proposals and any other documents submitted to ODJFS in response to any RFP, RLB, etc., shall become the property of ODJFS. This RLB and, after the selection of a vendor for award, any proposals submitted in response to an RFP/RLB are deemed to be public records pursuant to R.C. 149.43. For purposes of this section, the term “proposal” shall mean both the vendor’s proposal (or application or other response documentation) and the cost proposal, if opened, submitted by the selected vendor/applicant, and any attachments, addenda, appendices, or sample products.

Any proposals submitted in response to any ODJFS RFP, RLB, etc. which make claims of trade secret information shall be disqualified from consideration immediately upon the discovery of such unallowable claim.

F. Contractual Requirements

Any contract resulting from the issuance of this solicitation is subject to the terms and conditions as provided in the model contract, which is available from ODJFS **upon request**. Potential vendors are strongly encouraged to read the model contract to be fully aware of all ODJFS contractual requirements.

G. Travel and Parking Expense Reimbursement

No travel or parking expenses, nor any other expenses, will be covered.

H. Public Release of Records

Public release of any evaluation or monitoring reports funded under this contract will be made only by ODJFS. Prior to public release of such reports, ODJFS must have at least a 30-day period for review and comment.

I. Confidentiality

All contracts or other business agreements will require that the contractor maintain the confidentiality of information and records which state and federal laws, rules, and regulations require to be kept confidential.

J. Ethical & Conflict of Interest Requirements

1. No contractor or individual, company or organization seeking a contract or other business agreement shall promise or give to any ODJFS employee anything of value that is of such character as to manifest a substantial and improper influence upon the employee with respect to his or her duties;
2. No contractor or individual, company or organization seeking a contract or other business agreement shall solicit any ODJFS employee to violate any of the conduct requirements for employees;
3. Any contractor acting on behalf of ODJFS shall refrain from activities which could result in violations of ethics and/or in conflicts of interest. Any contractor or potential contractor who violates the requirements and prohibitions defined here or of Section 102.04 of the ORC is subject to termination of the contract or other agreement or refusal by ODJFS to enter into a one; and

4. ODJFS employees and contractors who violate Sections 102.03, 102.04 2921.42 or 2921.43 of the ORC may be prosecuted for criminal violations.

K. Unresolved Findings for Recovery (R.C. 9.24)

Ohio Revised Code Section 9.24 prohibits ODJFS from awarding a contract to any entity against whom the Auditor of State has issued a finding for recovery if the finding for recovery is “unresolved” at the time of award. By submitting a proposal, the vendor warrants that it is not now, and will not become, subject to an “unresolved” finding for recovery under R.C. 9.24 prior to the award of any contract or business agreement arising out of this RLB, without notifying ODJFS of such finding. ODJFS will review the Auditor of State’s website prior to the evaluations of any proposal submitted pursuant to this RLB. ODJFS will not evaluate a proposal from any vendor whose name, or the name of any of the subcontractors proposed by the vendor, appears on the website of the Auditor of the State of Ohio as having an “unresolved” finding for recovery.

L. Mandatory Contract Performance Disclosure

Each proposal must disclose whether the vendor’s performance, or the performance of any of the proposed subcontractor(s), under contracts for the provision of services that are the same or similar to those described in this RLB, has resulted in any “formal claims” for breach of those contracts. For purposes of this disclosure, “formal claims” means any claims for breach that have been filed as a lawsuit in any court, submitted for arbitration (whether voluntary or involuntary, binding or not), or assigned to mediation. If any such claims are disclosed, vendor shall fully explain the details of those claims, including the allegations regarding all alleged breaches, any written or legal action resulting from those allegations, and the results of any litigation, arbitration or mediation regarding those claims, including terms of any settlement. While disclosure of any formal claims in response to this section will not automatically disqualify a vendor from consideration, at the sole discretion of ODJFS, such claims and a review of the background details may result in a rejection of the vendor’s proposal. ODJFS will make this decision based on its determination of the seriousness of the claims, the potential that the behavior that led to the claims could negatively impact vendor’s performance of the work, and the best interests of ODJFS.

M. Mandatory Disclosures of Governmental Investigations

Each proposal must indicate whether the vendor and any of the proposed subcontractor(s) has been the subject of any adverse regulatory or adverse administrative governmental action (federal, state, or local) with respect to vendor’s performance of services similar to those described in this RLB. If any such instances are disclosed, vendor must fully explain, in detail, the nature of the governmental action, the allegations that led to the governmental action, and the results of the governmental action including any legal action that was taken against vendor by the governmental agency. While disclosure of any governmental action in response to this section will not automatically disqualify a vendor from consideration, such governmental action and a review of the background details may result in a rejection of the vendor’s proposal at the sole discretion of ODJFS. The decision by ODJFS on this issue will be based on a determination of the seriousness of the matter, the matter’s potential impact on the vendor’s performance of the work, and the best interests of ODJFS.

N. Vendor Selection Restriction

Any vendor deemed not responsible, or submitting a proposal deemed not to be responsive to the terms of this RLB, shall not be selected for this project.

O. Waiver of Minor Proposal Errors

ODJFS may, at its sole discretion, waive minor errors or omissions in proposals, bids, and/or forms when those errors do not unreasonably obscure the meaning of the content. Additionally, ODJFS reserves the right to request clarifications or completions from vendors to any information in their proposals, bids,

and/or forms, and may request such clarification as it deems necessary at any point in the proposal/bid review process.

XII. Health Insurance Portability & Accessibility Act (HIPAA) Requirements

As a condition of doing business with ODJFS, the contractor, and any subcontractor(s), will be required to comply with 42 U.S.C. Sections 1320d through 1320d-8, and to implement regulations at 45 C.F.R. Section 164.502 (e) and Sections 164.504 (e) regarding disclosure of protected health information under the Health Insurance Portability and Accountability Act (HIPAA) of 1996. Protected Health Information (PHI) is information received by the contractor from or on behalf of ODJFS that meets the definition of PHI as defined by HIPAA and the regulations promulgated by the United States Department of Health & Human Services, specifically 45 CFR164.501 and any amendments thereto.

In the event of a material breach of vendor obligations under this section, ODJFS may at its option terminate the contract.

XIII. State Contracts

Proposals must list any current contracts the vendor has with State of Ohio agencies and universities/colleges. The list must indicate the purpose of the contract, the amount of the contract, the time period covered by the contract, and the percent of the project completed. Vendors must complete the **“Required Vendor Information and Certifications”** (provided as **Attachment A**) and include the completed document in the vendor’s proposal as specified in Section IX., Format of Submission.

XIV. Caveat

ODJFS is under no obligation to select a vendor as a result of this solicitation if, in the opinion of ODJFS and the proposal review team, none of the proposals are responsive to the objectives and needs of the Department. ODJFS reserves the right to not select any vendor should ODJFS decide not to proceed with the project.

XV. Communications Prohibitions

From the issuance date of the RLB, until a contract is in effect, there may be no communications concerning the RLB between any interested potential vendor and any employee of ODJFS in the issuing office, or any other ODJFS employee, or any other individual regardless of their employment status, who is in any way involved in the development of the RLB or the decision with a formal procurement.

The only exceptions to this prohibition are as follows:

- A. As necessary in the case of any pre-existing business relationship between ODJFS and a vendor which could potentially respond to this RLB, in order to conduct that business;
- B. As part of an interview necessary for ODJFS to make a vendor selection decision;
- C. If it becomes necessary to revise any part of this RLB, revisions will be posted on the ODJFS web page established for this RLB; and
- D. If it becomes necessary to revise any part of this RLB, revisions will be posted on the ODJFS web page: <http://jfs.ohio.gov/rfp> and notices of such will be sent to vendors on the original mailing list and to anyone participating in the clarification process conducted pursuant to Section V. above; and
- E. Any Public Records Request (PRR) made through the ODJFS Office of Legal Services:

Requests from potential vendors or contractors for copies of previous RLBs, past vendor proposals, score sheets or contracts for this or similar past projects, are Public Information Requests (PRRs), and are not clarification questions regarding the present RLB. PRRs, submitted in accordance with directions provided in this Section XV.

Communications Prohibited, will be honored. The posted time frames for ODJFS responses to Internet questions for RLB clarification do not apply to PRRs.

* Important Note: Amendments to the RLB or to any documents related to it will be accessible to interested vendors through the original ODJFS website established for the RLB. All interested vendors are strongly encouraged to refer to the appropriate website regularly for amendments or other announcements. Failure on the part of ODJFS to notify any vendors of any possible changes or announcements related to this RLB does not absolve the vendors from their responsibility to look for updated information through the web page.

Proposals submitted by a vendor who attempts any communications prohibited by this Section may be disqualified by ODJFS from consideration for this project. ODJFS is not responsible for the accuracy of any information regarding this RLB that was obtained or gathered through a source other than the Question and Answer process described in this RLB.

XVI. Protests

Any potential, or actual, vendor objecting to the award of a contract or a vendor selection resulting from the issuance of this solicitation may file a protest of the award or selection, or of any other matter relating to the process of soliciting the proposals. Such a protest must comply with the following guidelines:

1. A protest may be filed by a prospective or actual bidder objecting to the award of a contract resulting from this solicitation. The protest shall be in writing and shall contain the following information:
 - a. The name, address, and telephone number of the protestor;
 - b. The name and number of the solicitation being protested;
 - c. A detailed statement of the legal and factual grounds for the protest, including copies of any relevant documents;
 - d. A request for a ruling by ODJFS;
 - e. A statement as to the form of relief requested from ODJFS; and
 - f. Any other information the protestor believes to be essential to the determination of the factual and legal questions at issue in the written protest.
2. A timely protest shall be considered by ODJFS, if it is received by ODJFS' Office of Legal Services, within the following periods:
 - a. A protest based on alleged improprieties in the issuance of the RLB or any other event preceding the closing date for receipt of proposals which are apparent or should be apparent prior to the closing date for receipt of proposals shall be filed no later than 10:00 a.m. of the closing date for receipt of proposals as specified in Section II., Time and Date of Submission.
 - b. If the protest relates to the announced intent to award the RLB(s), the protest shall be filed no later than 10:00 a.m. of the **seventh (7th) calendar** day after the issuance of formal letters sent to all responding applicants regarding the State's intent to make the awards. The date on these ODJFS letters to responding applicants is the date used to determine if a protest regarding the intent to award is submitted by the end of the protest period.
3. An untimely protest may be considered by ODJFS if ODJFS determines that the protest raises issues significant to the department's procurement system. An untimely protest is one received by ODJFS' Office of Legal Services after the time periods set forth in Item #2 of this section.
4. All protests must be filed at the following location:

Chief Legal Counsel, Office of Legal Services
Ohio Department of Job and Family Services
30 East Broad Street, 31st Floor
Columbus, Ohio 43215-3414

5. When a timely protest is filed, a contract award shall not proceed until a decision on the protest is issued or the matter is otherwise resolved, unless the Director of ODJFS determines that a delay will severely disadvantage the Department. The vendor(s) who would have been awarded the contract shall be notified of the receipt of the protest.
6. ODJFS' Office of Legal Services shall issue written decisions on all timely protests and shall notify any vendor who filed an untimely protest as to whether or not the protest will be considered.

SECTION XVII. ATTACHMENTS AND APPENDICES

- A. **Required Vendor Information and Certifications** (To be completed & included in proposal packet as specified in Section IX.)
- B. **Request for Taxpayer Identification Number (W-9) Form** (To be completed & included in proposal packet as specified in Section IX.) <http://www.irs.gov/pub/irs-pdf/fw9.pdf>
- C. **Declaration of Material Assistance Form** (To be completed & included in proposal packet as specified in Section IX.) <http://www.homelandsecurity.ohio.gov/dma/dma.asp>
- D. **Vendor's Proposal Score Sheet** (For vendor self-evaluation purposes...do not submit)
- E. **Cost Proposal Form** (To be completed & included in cost proposal packet as specified in Section IX.)

Thank you for your interest in this project.



Attachment A

Customized Curriculum Development
RLB # R-1011-15-8054

REQUIRED VENDOR INFORMATION and CERTIFICATIONS

Purpose: The Ohio Department of Job and Family Services (ODJFS) requires the following information on vendors who submit proposals or bids in response to any ODJFS Requests for Proposals (RFPs), Requests for Letterhead Bids (RLBs), or other competitive opportunity in order to facilitate the development of the contract (or finalization of a purchase) with the selected vendor. ODJFS reserves the right to reject any proposal if this information is not provided fully, accurately, and by the deadline set by ODJFS. Further, some of this information (as identified below) **must** be provided in order for ODJFS to accept and consider a proposal\bid. **Failure to provide such required information will result in the proposal's immediate disqualification.**

Instructions: Provide the following information regarding the vendor submitting the proposal or bid. Vendors may either print this attachment, complete and sign it, or may provide the required information and certifications (each fully re-stated from this attachment) on their letterhead as the opening pages of their proposals. It is mandatory that the information provided is certified with an original signature (in blue ink, please) from a person with authority to represent the vendor. Vendors are to provide the completed and signed information and certifications as a component of their original proposal, according to instructions in the RFP (etc.) for proposal/bid composition.

IMPORTANT: If the RFP\RLB specified a maximum page limit for vendor proposals\bids, the attachment of any required certifications, other documents, or additional pages needed to fully provide the information requested here will NOT be counted against that page limit.

Vendors must provide all information

1. ODJFS RFP/RLB/IFP (etc.) #:	2. Proposal Due Date:
3. Vendor Name: (legal name of the vendor – person or organization – to whom contract\purchase payments would be made)	4. Vendor Federal Tax ID # or Social Security #: (this number MUST correspond with the name in Item # 3)
5. Vendor Corporate Address:	6. Vendor Remittance Address: (or “same” if same as Item # 5)
7. Print or type information on the vendor representative/contact person <u>authorized to answer questions on the proposal\bid:</u> Vendor Representative: Representative’s Title: Address: Phone #: Fax #: E-Mail:	

8. Print or type the name of the vendor representative authorized to address contractual issues, including the authority to execute a contract on behalf of the vendor, and to whom legal notices regarding contract termination or breach, should be sent (if not the same individual as in #7, provide the following information on each such representative and specify their function):

Vendor Representative:
Representative's Title:
Address:
Phone #:
Fax #:
E-Mail:

9. Is this vendor an Ohio certified MBE? Yes No If yes, attach a copy of current certification to proposal\bid. (Note: IF ODJFS has specified the RFP\RLB\purchase document as an opportunity open exclusively to Ohio Certified MBEs, then failure to attach a copy of current certification WILL RESULT IN DISQUALIFICATION.)

10. Mandatory Vendor Certifications:

ODJFS may not enter into contracts with/make purchases from any vendors who have been found to be ineligible for state contracts under specific federal or Ohio statutes or regulations. Vendors responding to any ODJFS RFP\RLB or other purchase opportunity **MUST** certify that they are **NOT INELIGIBLE** by signing each of the three statements below. **Failure to provide proper affirming signature on any of these statements will result in the disqualification of your proposal\bid.**

I _____ (signature of representative shown in Item # 7, above) **hereby certify and affirm that** _____ (name of the vendor shown in Item # 3, above), **has not been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in transactions by the United States Department of Labor, the United States Department of Health and Human Services, or any other federal department or agency as set forth in 29 CFR Part 98, or 45 CFR Part 76, or other applicable statutes.**

AND

I _____ (signature of representative shown in Item #7, above) **hereby certify and affirm that** _____ (name of the vendor shown in Item # 3, above), **is not on the list established by the Ohio Secretary of State, pursuant to ORC Section 121.23, which identifies persons and businesses with more than one unfair labor practice contempt of court finding against them.**

AND

I _____ (signature of representative shown in Item #7, above) **hereby certify and affirm that** _____ (name of the vendor shown in Item # 3, above), **either is not subject to a finding for recovery under ORC Section 9.24, or has taken appropriate remedial steps required under that statute, or otherwise qualifies under that section to enter into contracts with the State of Ohio.**

11. Work Location Declaration: Identify the location(s) (i.e., city, state/province, country) where all work for the proposed project will be performed, by the proposing Vendor and by any Subcontractors: _____ -

_____ .

12. Equal Employment Opportunity Information on the Vendor and any Subcontractor(s)

A. Provide vendor employee data both nationwide (including Ohio staff), and Ohio office employees separately:

	<u>Nationwide:</u>	<u>Ohio Offices:</u>
Total Number of Employees:	_____	_____
% of those who are Women:	_____	_____
% of those who are Minorities:	_____	_____

B. If you are the selected vendor, will you subcontract any part of the work?

NO -or- YES, but for less than 50% of the work -or- YES, for 50% or more of the work

If yes, provide the following information on each subcontractor (additional pages may be added as needed):

Subcontractor Name: _____

Address: _____

Work To Be _____

Performed: _____

(a brief description) _____

Subcontractor's Estimated Percentage of Total Project (in % of work, not % of dollars):

If 50% or more of the work will be subcontracted, then ALSO provide the following information on ALL proposed subcontractors:

	<u>Nationwide:</u>	<u>Ohio Offices:</u>
Total Number of Employees:	_____	_____
% of those who are Women:	_____	_____
% of those who are Minorities:	_____	_____

C. Identify all state contracts which the vendor has had approved by the Controlling Board since the beginning of the last fiscal year (i.e., since July 01, 2004) through this fiscal year to date. Also include contracts approved for ODJFS or institutions of higher education:

Total number of contracts: _____

For each state contract, list the state agency and provide the following information:

State Agency/Educational Institution: _____

Contract Dollar Amount: _____

State Agency/Educational Institution: _____

Contract Dollar Amount: _____

State Agency/Educational Institution: _____

Contract Dollar Amount: _____

Attach additional pages if needed

13. Vendor and Grantee Ethics Certification

As a vendor or grantee doing business with* or receiving grants from the State of Ohio, I certify on behalf of _____ (name of vendor or grantee):

- (1) I have reviewed and understand Ohio ethics and conflict of interests laws, as found in Chapter 102. and Sections 2921.42 and 2921.43 of the Ohio Revised Code.
- (2) I have reviewed and understand Governor Strickland's Executive Order Number 2007-01S.
- (3) I will not do anything inconsistent with those laws or Executive Order Number 2007-01S.
- (4) I acknowledge that failure to comply with this certification, is, by itself, grounds for termination of this contract or grant with the State of Ohio.

Signature of authorized agent

Date

****Doing business with** includes all contracts for goods and services, excluding purchases made using the State of Ohio's Payment Card Program that cost less than \$1,000.**

14. I have read the ODJFS Model Contract attached to the RFP/RLB, and if awarded a contract, I will not _____ (or) I will _____ request changes to the standard language, and have marked the requested changes and returned the model document with this proposal for consideration by ODJFS. (If so, ODJFS will review those requested changes if you are the selected vendor. All requested changes to model contract language are subject to ODJFS approval.) (NOTE: Item 14 is not applicable and not required when the subject ODJFS procurement opportunity is offered only to State Term Schedule Vendors.)

15. I _____, (vendor representative in Item # 7) hereby affirm that this proposal accurately represents the capabilities and qualifications of _____ (vendor's name), and I hereby affirm that the cost(s) bid to ODJFS for the performance of services and/or provision of goods covered in this proposal in response to the ODJFS RFP/RLB/other purchase opportunity is a firm fixed price, inclusive of all incidental as well as primary costs. (Failure to provide the proper affirming signature on this item may result in the disqualification of the vendor's proposal/bid.)



ATTACHMENT D

Customized Curriculum Development Vendor's Proposal Score Sheet RLB#: R-1011-15-8054

PHASE I: Initial Qualifying Criteria Vendor/Applicant Name: _____

The proposal must meet all of the following Phase I proposal acceptance criteria in order to be considered for further evaluation. Any proposal receiving a "no" response to any of the following qualifying criteria shall be disqualified from consideration.

Table with 5 columns: ITEM, PROPOSAL ACCEPTANCE CRITERIA, RFP Section Reference, YES, NO. Contains 8 rows of evaluation criteria.

PHASE II: Criteria for Scoring of Vendor's Proposal

Qualifying vendor's proposals will be collectively scored by a Proposal Review Team (PRT) appointed by ODJFS, Office of Workforce Development. For each of the evaluation criteria given in the following score sheet, reviewers will collectively judge whether the vendor's proposal exceeds, meets, partially meets or does not meet the requirements expressed in the RFP, and assign the appropriate point value, as follows:

Scoring scale table: 0 Does Not Meet Requirement, 2 Partially Meets Requirement, 4 Meets Requirement, 6 Exceeds Requirements

A vendor proposal's total PHASE II score will be the sum of the point value for all the evaluation criteria. The review team will collectively score each individual qualifying proposal. Vendor's proposals which do not meet or exceed a total score of at least 96 points (a score which represents that it "meets" all the evaluation criteria) out of a maximum of 138 points, will be disqualified from further consideration, and its cost proposal will neither be opened nor considered. Only those vendors who's Vendor's Proposals meet or exceed the minimum required proposal points will advance to PHASE III of the vendor's proposal score sheet.

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weighting	Doesn't Meet 0	Partially Meets 2	Meets 4	Exceeds 6
VENDOR QUALIFICATIONS							
MANDATORY QUALIFICATIONS							
1	The vendor has demonstrated that they have at least five (5) years of workforce development experience.	V.	1				
2	The vendor has demonstrated that they have at least five (5) years experience in curriculum development	V.	1				
3	The vendor has assigned and identified a project manager and a curriculum development specialist for this project	V.	1				
ORGANIZATIONAL EXPERIENCE & CAPABILITIES							
4	Narrative specifically describing the vendor's experience in curriculum development and workforce training.	V.	2				
5	Narrative describing, at least two, but no more than four, similar sized projects completed in the past five years that demonstrate expertise necessary to successfully accomplish this project	V.	2				
6	The vendor has included the names and contact information for at least three entities for which the vendor has performed similar large scale projects in the past five years	V.	1				
7	Letters of support from, at a minimum, three (3) employers regarding the vendor's experience collaborating with the vendor on a project	V.	2				
STAFF EXPERIENCE & CAPABILITIES							
8	The vendor has identified, by position and by name, those staff they consider key to the project's success (at minimum, key staff identified must include a project manager a curriculum specialist)	V.	1				
9	The vendor has included the resume(s), education and experience of the project manager, curriculum development specialist and all key staff expected to work on the project (including any subcontractors).	V.	1				
10	The vendor has indicated that the project manager is or shall be Ohio-based	V.	1				
11	The vendor has indicated that the project manager has at least two (2) years experience working in workforce development	V.	1				
12	The vendor has indicated that the project manager has at least two (2) years of general management experience including operational, administrative and budget/management	V.	1				
13	The vendor has indicated that the project manager has at least a bachelor's degree	V.	1				
14	The vendor has indicated that the curriculum development specialist is or shall be Ohio-based	V.	1				
15	The vendor has indicated that the curriculum development specialist has at least five (5) years experience in curriculum development	V.	1				
16	The vendor has indicated that the curriculum development specialist has at least three (3) years experience in workforce development	V.	1				
SPECIFICATIONS OF DELIVERABLES							
17	The vendor demonstrates that they can develop an employability and re-employment skills training curriculum for dislocated and long term unemployed workers.	VII.A.	2				
18	The vendor demonstrates that they can develop an Instructor's Guide to support delivery of the curriculum.	VII.A.	2				
TRADE SECRET INFORMATION							
30	The review team in its comprehensive review of the vendor's proposal has determined that the proposal was free of trade secret/proprietary information as specified/restricted in the RFP. [A "no" response will disqualify the vendor's proposal and will not advance to the consideration of the vendor's Cost Proposal.]	XI.E.			YES	NO	
Column Subtotal of "Partially Meets" points							
Column Subtotal of "Meets" points							
Column Subtotal of "Exceeds" points							
TOTAL SCORE:							

Based upon the Total Vendor's Proposal Score earned, does the vendor's proposal proceed to the Phase III evaluation of its Cost Proposal? (Vendor's Grand Total Proposal Score must be at least 96 points.)

Yes _____ No _____ (If "No," Vendor's Cost Proposal will not be opened.)

The Cost Proposal will be reviewed by ODJFS. The grand total of each technically qualified vendor's Cost Proposal is divided by that vendor's final Proposal score. This compares the cost with the quality of the Vendor's Proposal, which will provide an average cost-per-quality point earned on the Vendor's Proposal. The vendor earning the best cost-per-quality point score will be recommended for contract award.



ATTACHMENT E
Project Budget Form
Customized Curriculum Development
RLB #: R-1011-15-8054

Applicants are to only show expenses directly related to the proposal project and must include a budget narrative with justification which clearly displays how costs and allocations were determined. Budget and budget item descriptions MUST support the objectives and program activities outlined for the project as well as any and/or all of the grant training program activities.

Table with 2 columns: SCOPE OF WORK / DELIVERABLES and SFY 11 COSTS. Rows include Deliverable - Section VII.A., Deliverable - Section VII. B., and GRAND TOTAL BUDGET.

Affirmation: The Grand Total Project Cost is firm for the duration of the proposed RLB and renewal periods (if applicable), and I, the undersigned, have authority to bind the applicant to the Project Budget.

Name (Signature) and Title

Date of Signature