

Organizational Change Management Consultant

REQUEST FOR LETTERHEAD BID (RLB): JFSR1617108131

MBE ONLY

State Term Schedule Only

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR LETTERHEAD BID

Please consider this as the Ohio Department of Job and Family Services (ODJFS) Request for Letterhead Bid (RLB) for the position of Organizational Change Management Consultant.

ODJFS is requesting resumes, project approach summaries, references summaries, and cost information for an Organizational Change Management Consultant. The position is needed from **March 6, 2017 to June 30, 2017 for approximately 692 hours, with the potential for extension.**

A Supplier may submit a maximum of two (2) responses, each containing a separate candidate to be considered for evaluation. A Supplier is not obligated to submit two (2) candidates and will not be evaluated on the number of candidates submitted. If a Supplier submits more than two (2) candidates only the first two (2) candidates will be evaluated.

BACKGROUND

ODJFS is seeking an Organizational Change Management Consultant for the Office of Information Services (OIS). OIS is going through an organizational transformation that will include a change in service delivery models, culture, and right-sizing.

Candidates should possess experience in overseeing organizational change management in complex environments.

Key Responsibilities and Scope of Activities:

- Conduct a change management assessment to include:
 - Readiness for change by stakeholder groups and staff; and
 - Options for change management approach by stakeholder groups and staff.
- Create a stakeholder analysis:
 - Prioritization of stakeholder groups; and
 - Define population and roadmap for change.
- Identify, analyze and define risk mitigation management plan and methods for tracking outcomes;
- Identify and manage anticipated resistance;
- Gather feedback and measure change adoption;
- Implement reinforcement processes supporting changes;
- Create actionable deliverables for the five (5) change management levels:
 - Communications plan;
 - Sponsor roadmap;

- Coaching plan;
- Training plan; and
- Resistance management plan.
- Support, engage and coach the organization's:
 - Senior leaders; and
 - Managers, supervisors and staff.
- Develop organizational design changes and definition of roles and responsibilities;
- Develop and coordinate alignment with other initiatives within the organization;
- Evaluate progress and enable organization readiness;
- Track, analyze and report issues;
- Define metrics to measure success;
- Create a change management timeline, monitor and track progress against the timeline; and
- Support change management at the organizational level by providing advisory consulting to senior management.

Qualifications:

- Certification in change management practices. Prosci Certification is preferred, but not required;
- Solid understanding of how people go through a change and the change process;
- Knowledge of and experience applying change management principles, methodologies and tools;
- Eight (8) years' experience leading change implementation. Experience in leading change management implementation for technology groups is preferred, but not required;
- Exceptional communication skills, both written and verbal;
- Experience communicating effectively and influencing various levels of an organization, including high level executives, deputy directors, team leaders and individual contributors;
- Excellent active listening skills;
- Ability to clearly articulate messages to a variety of audiences;
- Ability to establish and maintain strong relationships, influence others and move toward a common vision or goal;
- Flexible and adaptable and able to work in ambiguous situations;
- Resilient and tenacious with a propensity to persevere;
- Forward looking with a holistic approach;
- Organized with a natural inclination for planning strategy and tactics;

- Problem solving and root cause identification skills;
- Must be a team player and able to work collaboratively with and through others;
- Acute business acumen and understanding of organizational issues and challenges;
- Familiarity with project management approaches, tools and phases of the project lifecycle;
- Experience with large-scale organizational change efforts; and

Project Approach Summary

ODJFS requests as part of the candidate submissions that a short high-level summary be presented that outlines the approach for this consulting engagement. The summary should outline key steps that will be taken for the project, to include but not limited to timeline, expected milestones, deliverables and the overall approach to be used for implementing and managing change within ODJFS OIS.

ADMINISTRATIVE

INTERNET Q&A PERIOD; RLB CLARIFICATION OPPORTUNITY

Suppliers may ask clarifying questions regarding this RLB via the Internet during the Q&A Period. To ask a question, Suppliers must use the following Internet process:

- * Access the ODJFS Web Page at <http://jfs.ohio.gov>;
- * Select "Doing Business with ODJFS" from the bottom of the page;
- * Select "RFP's" from the left side column;
- * Select RLB JFSR1617108131 Title "Organizational Change Management Consultant" the list of competitive opportunities;
- * Follow the link to the dedicated web page;
- * Select "Submit Inquiry" near the bottom of the web page;
- * Follow instructions there for submitting questions; or, to view posted questions and answers,
- * Select "View Q and A" near the bottom of the web page.

Questions submitted after 8:00 a.m. on the date the Q&A period closes will not be answered.

ODJFS' responses to all questions asked via the Internet will be posted on the webpage dedicated to this RLB. ODJFS will not provide answers directly to the Supplier that submitted the question. ODJFS' answers may be accessed by following the instructions above, but rather than selecting "Submit Inquiry," Suppliers and others should select "View Q and A." ODJFS strongly encourages Suppliers to ask questions early in the Q&A period so that answers can be posted with sufficient time for any possible follow-up questions.

Should Suppliers experience technical difficulties accessing the ODJFS website where the RLB and its related documents are published, they may contact the ODJFS Office of Contracts and Acquisitions (OCA), RFP/RLB Unit, at (614) 728-5693 for guidance.

DUE DATES

All responses are due by 1:00 pm, EST, on February 1, 2017. Any response received after the required time and date specified for receipt shall be considered late and nonresponsive. Late responses will not be evaluated for award.

SCHEDULE OF EVENTS

All times are Eastern Standard Time (EST).

Event	Date
1. RLB Distribution to Suppliers	January 17, 2017
2. Q&A Period and Clarification Opportunity	January 17, 2017 – January 27, 2017
3. Response Due Date	February 1, 2017
4. Target Date To Complete Response Reviews	February 13, 2017
5. Projected Interview Dates	February 16 – 20, 2017
6. Anticipated Decision of Award	February 23, 2017
7. Anticipated Commencement Date of Work	March 6, 2017

EVALUATION FACTORS FOR AWARD

EVALUATION

The following will be considered in determining the Supplier to be selected for this engagement:

1. Completeness of proposal sections;
 2. Candidate Personnel Profile Reference Summary;
 3. Candidate resume;
 4. Project approach summary; and
 5. Proposed rate(s).
- The Supplier will not be permitted to substitute personnel for the candidate submitted for RLB evaluation (during the RLB evaluation or at project start-up), except when a

candidate's unavailability is no fault of the Supplier (e.g., candidate is no longer employed by the Supplier).

- If substitution of the selected candidate occurs after award, the response may be re-evaluated and other Suppliers may be provided the opportunity to resubmit candidates.
- All responses will be evaluated for meeting the requested information as outlined in the guidelines for response preparation. Responses not following the format will be eliminated from consideration. The responses will be scored based on completeness, the proposed candidate, project approach, reference summary, and rate.
- Candidate substitution between the response evaluation and interview periods are highly discouraged. If other responses have qualified candidates, the substitution request may be denied and the response may be eliminated from evaluation.
- If it is determined that no Supplier has presented qualified candidates then Suppliers who provided responses will be asked to confirm their candidates and/or provide substitutions. The evaluation process then will start over based on the Suppliers' confirmation and/or substitution of candidates.

TERM AND AWARD

- The award will be for Time and Material through State Term Schedule (STS) contract using STS categories and must reflect or be lower than STS rates.
- The term will be until June 30, 2017 with the potential for extension.
- No additional costs, such as travel, meals, lodging, taxes, parking or other associated costs may be charged separately for this work. The Supplier's sole compensation for the duties described herein shall be the billings at the Supplier's hourly rate.
- All selected candidates shall read, acknowledge and follow the Department of Administrative Services (DAS) and ODJFS policies, rules and guidelines.
- All work performed by the selected candidate shall be deemed a "work-for-hire," and shall be the sole property of the State of Ohio. Neither the Supplier nor the candidate may use such work without ODJFS OIS' written consent.
- Selected candidates shall use Supplier provided equipment (i.e. laptop computers, mobile phones, etc.) and will all follow State and ODJFS security policies.
- The selected candidate, as a component of the project kick-off meeting, will be required to sign any state policy documents that are deemed appropriate by ODJFS.

STATUS REPORTING

The Supplier or selected candidate will provide weekly status reports to ODJFS in a format mutually agreed upon in writing. The selected candidate will be responsible for meeting all timelines and deliverables. Weekly timesheets will be reviewed and approved by the designated ODJFS contract manager. Invoices must be accompanied by timesheets and submitted monthly for payment.

GUIDELINES FOR QUOTATION PREPARATION

QUOTATION SUBMITTAL

The printed Response MUST be provided with appropriate signatures.

Each Supplier must submit three (3) printed copies of each response, sealed within a box or envelope, containing appropriate signatures on each proposal copy. **The printed copies are to exclude cost information.** The submission must be clearly marked “JFSR1617108131: Organizational Change Management Consultant” on the outside of its box or envelope along with the Supplier name.

The cost information MUST be in a SEPARATELY SEALED ENVELOPE.

The envelope must be clearly marked “JFSR1617108131: Organizational Change Management Consultant – STS Quote” on the outside of its envelope along with the Supplier name. This envelope must be submitted within the box or envelope that contains the printed responses.

An electronic copy MUST be submitted in a SEPARATELY SEALED ENVELOPE.

A single electronic copy of the complete response must also be submitted with the printed responses that includes the cost information. Electronic submissions can be on a CD, DVD or USB memory stick and must be submitted within the box or envelope that contain the printed proposals. The envelope must be clearly marked “JFSR1617108131: Organizational Change Management Consultant – Digital Copy” on the outside of its envelope along with the Supplier name.

Quotation Organization

Each response must be organized in the format as described below. Any material deviation from the format outlined below may result in the disqualification of the non-conforming response. Each response must contain an identifiable tab sheet preceding each section. The hourly rate within the cost information should be good for a minimum of forty-five (45) days.

- Supplier Cover Letter (include email address of Supplier) signed by a Supplier representative authorized to address contractual issues, including the authority to execute an award on behalf of the Supplier, and to whom legal notices regarding termination or breach should be sent;
- MBE Certification – Required;
- Project Approach Summary;
- State Term Schedule Number;
- Candidate Information:
 - Candidate Personnel Profile Reference Summary (3 minimum) – using format defined in Attachment One; and
 - Candidate Resume – Supplier format.
- Candidate Hourly Rate – Submitted in the separately sealed envelope.

It is the affirmative responsibility of the Supplier submitting a response to remove all personal confidential information (such as home addresses and social security numbers) from candidate resume or any other part of the response. Following submission to ODJFS, all applications submitted will become part of the public record.

ODJFS will not be liable for any costs incurred by any Supplier in responding to this RLB. ODJFS may decide not to make an award at its discretion. ODJFS will disqualify late responses. ODJFS may also disqualify any response that it believes is not in its interest to accept and may decide not to do business with any of the Suppliers responding to this RLB.

Responses MUST be submitted to:

ODJFS Bid Room – Office of Contracts and Acquisitions
30 East Broad Street, 31st Floor
Columbus, OH 43215

PROPRIETARY INFORMATION

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

All responses and any other documents submitted to ODJFS in response to any procurement effort shall become the property of ODJFS. After selection of the candidate, all responses submitted are deemed to be public records pursuant to ORC 149.43. The term “response” shall mean the cover letter, project approach summary, resume, reference summary, and the cost information, if opened, submitted by the Supplier, as well as any attachments, addenda, appendices, or sample products.

WAIVER OF DEFECTS

ODJFS has the right to waive minor defects that are not material when no prejudice will result to the rights of any Supplier or to the public.

REJECTION OF RESPONSES

ODJFS may reject any response that is not in the required format, does not address all the requirements of this RLB, or that ODJFS believes is excessive in price or otherwise not in its interest to consider or to accept. ODJFS will reject any non-STS proposal submitted. In addition, ODJFS may cancel this RLB, reject all the responses, and seek to do the work through a new RLB or other means.

EVALUATION OF RESPONSES

Clarifications and Corrections

During the evaluation process, ODJFS may request clarifications from any Supplier under active consideration. It also may give any Supplier the opportunity to correct defects in its response. ODJFS will allow corrections only if they do not result in an unfair advantage for the Supplier and is in ODJFS' best interest.

Requirements

This RLB asks for responses from Suppliers. While each criterion represents only a part of the total basis for a decision to award to a Supplier, a failure by a Supplier to make a required submission or meet a requirement will result in the disqualification of that Supplier's response. The value assigned to each criterion is used to determine which response is the most advantageous to ODJFS in relation to the other responses received.

The evaluation process will consist of four (4) distinct phases:

1. ODJFS' initial review of all responses for defects.
2. The review committee's evaluation of the responses.
3. Cost Information.
4. The review committee's evaluation of the interviews.

Initial Review

ODJFS will disqualify any response that is incomplete, incorrectly formatted, or is not submitted by an MBE certified Supplier. ODJFS will forward all timely, complete, and properly formatted responses to a review committee, comprised of staff from ODJFS OIS.

Committee Review of the Responses

ODJFS' review committee will collectively score those responses not disqualified in the initial review by assessing how well the candidate meets the requirements as specified in this RLB. Using the score sheet included as Attachment Two, the review committee will read, review, discuss, and reach consensus of a score for each qualifying response.

Those Suppliers submitting the three (3) highest scoring responses will be scheduled for an interview with the review committee.

At any time during the evaluation, ODJFS may ask a Supplier to correct, revise, or clarify any portions of its response.

ODJFS will document all major decisions in writing and make these a part of the file along with the evaluation scores for each response considered.

Once the resume, project approach summary, and cost information are considered, interviews will be scheduled and conducted.

Interviews

Candidates will be requested to participate in an in-depth interview as part of the evaluation process. The interview will include participants from ODJFS and OIS. ODJFS reserves the right to select from the responding candidates for interviews and may not interview all candidates. The candidate shall bear all costs of any scheduled interview.

Determination of Responsibility

ODJFS reserves the right to reject applications from vendors that have performed unsatisfactorily under prior contracts or projects with ODJFS.

Changing Candidates

The major criterion on which ODJFS bases its award is the quality of the candidate. Changing personnel after the award may be a basis for termination of the award.

Award Process

It is ODJFS' intention to make one (1) award under the scope of this RLB based on the RLB Schedule of Events, so long as ODJFS determines that doing so is in its best interests. After ODJFS makes its decision under this RLB, all Suppliers will be notified in writing of the final determination of their responses.

PROTESTS

A protest may be filed by a prospective or actual Supplier objecting to the award resulting from this RLB.

- A protest based on alleged improprieties in the issuance of the RLB or any other event preceding the closing date which are apparent or should be apparent prior to the closing date for receipt of responses shall be filed no later than the closing date for receipt of quotes.
- If the protest relates to the announced intent to award, the protest shall be filed no later than 3:00 p.m. of the seventh (7th) calendar day after the issuance of written notifications sent to all responding Suppliers regarding the ODJFS' intent to make the award. The date on these ODJFS letters to responding Suppliers is the date used to determine if a protest regarding the intent to award is submitted by the end of the protest period.
- An untimely protest may be considered if ODJFS determines that the protest raises issues significant to the solicitation process. An untimely protest is one received by ODJFS after the time period set forth in this section.
- All protests must be filed at the following location:

Deputy Director
ODJFS Office of Contracts and Acquisitions
30 East Broad Street, 31st Floor

Columbus, Ohio 43215

- When a timely protest is filed, an 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 ODJFS. The Supplier who would have been awarded shall be notified of the receipt of the protest.
- ODJFS' Office of Contracts and Acquisitions shall issue written decisions on all timely protests and shall notify any Supplier who filed an untimely protest as to whether or not the protest will be considered.

ATTACHMENT ONE
CANDIDATE PERSONNEL PROFILE REFERENCE SUMMARY

References

Provide three (3) references for which the candidate has successfully demonstrated meeting the requirements of the RLB on projects of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of project size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The references are to be provided from a person that the candidate has performed the work for and from a person that is not employed by the candidate's employer

If less than three (3) references are provided, the Supplier must explain the reason for the shortage. ODJFS may disqualify the response if fewer than three (3) references are given.

Candidate Reference Form

Candidate's Name:

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Initiative Name:	Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year	
Description of services provided that are in line with those to be provided as part of this Request:			
Description of how client project size and complexity are similar to this request:			

Request for Letterhead Bid Evaluation Criteria - Supplier _____
Candidate _____

Mandatory Requirements: Accept/Reject

- Supplier cover letter
- Supplier submitted properly formatted response by submission deadline

Qualifications	Weight	Does Not Meet	Meet	Exceeds
Supplier shows candidate experience providing management consulting services establishing strategic direction and change implementation action plans.	6	0	5	7
Supplier has provided three (3) references for which they have successfully demonstrated meeting the requirements of the RLB on projects of similar size and scope in the last five (5) years.	5	0	5	7
Supplier has provided a Project Approach Summary contains a high level outline of key steps, timeline, expected milestones, deliverables and overall approach for change management implementation.	3	0	5	7
Supplier has demonstrated candidate has a minimum of eight (8) years leading change management projects.	5	0	5	7
Supplier has demonstrated candidate has certification in change management practices.	4	0	5	7

Price Performance Formula. The evaluation team will rate the responses that meet the qualifications based on the following criteria and respective weights.

Criteria	Percentage
Response	70%
Cost Information	30%

To ensure the scoring ratio is maintained, ODJFS will use the following formulas to adjust the points awarded to each Supplier. The Supplier with the highest point total for resume, project approach summary, and reference summary will receive 700 points. The remaining Suppliers will receive a percentage of the maximum points available based upon the following formula:

$$\text{Response Points} = (\text{Candidate's Resume, Project Approach Summary, Reference Summary Points} / \text{Highest Number of Resume, Project Approach Summary, Reference Summary Points Obtained}) \times 700$$

The Supplier with the lowest hourly rate will receive 300 points. The remaining Suppliers will receive a percentage of the maximum cost points available based upon the following formula:

$$\text{Cost Information Points} = (\text{Lowest Hourly Rate} / \text{Supplier's Hourly Rate}) \times 300$$

Total Points Score: The total points score is calculated using the following formula:

$$\text{Total Points} = \text{Response Points} + \text{Cost Information Points}$$

