



**Ohio Department of Job and Family Services**  
**Request for Letterhead Bids (RLB)**  
**RLB#: R-89-01-0973 Administrative Consultation Services**

**I. Purpose**

The Ohio Department of Job and Family Services (ODJFS) and the Governor's Office of Faith-Based and Community Initiatives (GOFBCI) are soliciting bids to identify a vendor/vendors who will complete and deliver any one, two or all three GOFBCI comprehensive feasibility studies on the following subjects:

- 1) The creation of a state-wide digital inventory of faith-based and community-based non-profits. The state-wide inventory is envisioned as an easy-to-use digital database of faith-based and community-based non-profits.
- 2) The creation of a Web-based Tool with a Geographical Information System (GIS) component connecting Ohio's faith-based and community-based non-profits with resources (i.e. funding, donors, training opportunities) as well as connecting volunteers with volunteer opportunities. The Web-based Tool is seen as a sophisticated way to match volunteer and support resources with the needs of community-based and faith-based organizations and nonprofits by connecting people and organizations looking *for* help with people and organizations looking *to* help. The (GIS) component will allow users across the state to create and analyze customized maps depicting areas of need in relation to the locations of existing service-providers.
- 3) The advisability of the GOFBCI becoming a private nonprofit entity rather than a part of the governor's office, or a combination of the two. The study will make recommendations regarding the most feasible organizational framework for GOFBCI— either housed in its current location as part of the Governor's office, or as a private nonprofit entity, or a combination of the two.

The selected vendor(s) will be responsible for delivering one or more of the feasibility studies to GOFBCI in accordance with the timeline below. This Request for Letterhead Bids (RLB) document is released by ODJFS, and the subsequent contract(s) expected to result from this RLB process will be between the vendor(s) and ODJFS.

GOFBCI will select one, two, or three vendors to complete the studies described in this RLB. Each selection will be based exclusively on the qualifications and technical approach offered by interested vendors, as evaluated through score criteria included in the respective Technical Proposal Score Sheet (Attachment D.) for each study; vendors are not to propose project costs. GOFBCI will pay a flat, all-inclusive fee of \$12,000.00 for each successfully completed study.

The GOFBCI will designate a staff member as the Contract Manager to provide on-going supervision of the contractor(s) selected through this RLB. The contract period for this project is expected to begin approximately June 20, 2008, and all project work must be completed not later than Sept.1, 2008. No extensions or renewals are planned for the contract expected to result from this RLB.

ODJFS will only accept proposals from vendors that demonstrate their capability of providing services as described in this RLB. This RLB document is released by and the subsequent contract(s) will be with ODJFS; the GOFBCI will be responsible for on-going supervision of the selected vendor's/vendors' services, activities, and performance. For the purpose of this RLB, the term "vendor" shall be defined as an (organization/individual) interested in this opportunity. The term "contractor" is used in reference to the successful vendor(s) 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 **3:00 p.m. Eastern (local) Time on May 27, 2008**. 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, 31<sup>st</sup> 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 31<sup>st</sup> Floor. All bids received on the due date will be accepted by the Office of Contracts and Acquisitions on the 31<sup>st</sup> 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(s) selected.

**III. Anticipated Procurement and Project Timetable**

May 09, 2008	ODJFS Releases RLB to Potential Vendors on the DAS and ODJFS Websites; Q & A Period Opens - Vendors may submit inquiries for RLB clarification
May 19, 2008	Vendor Q & A Period closes, 8 a.m. for inquiries for RLB clarification - No further inquiries for RLB clarification will be accepted
May 21, 2008	ODJFS posts Final Vendor Question & Answer Document on ODJFS website

May 29, 2008	<b>Deadline for Vendors to Submit Proposals to ODJFS (3:00 P.M., local time)</b>
June 9, 2008	<b>ODJFS Issues Vendor Selection Notification Letter(s) (estimated)</b>
June 20, 2008	<b>Purchase Order approval – work may not begin until a state Purchase Order has been fully approved by OBM. <u>(ESTIMATED DATE)</u></b>
August 15, 2008	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(s) 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(s) 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-89-01-0973***;
- \* Select the [R-89-01-0973@odjfs.state.oh.us](mailto:R-89-01-0973@odjfs.state.oh.us)” link; 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 **10:00 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 this RFP, ODJFS requires that interested vendors must address all the following minimum qualifications as well as organizational and staff experience and capabilities as described in this Section:

### **A. Mandatory Vendor Qualifications**

1. ODJFS will consider proposals from vendors with:
  - a minimum of two (2) years of experience in the field of information technology, e-commerce, e-philanthropy, e-marketing, or a related field, if responding to provide the feasibility study for The Inventory and/or The Web-based Tool with GIS component; **OR**
  - two (2) years of experience in the study and analysis of public and private organizational structure and management, if responding to provide the feasibility study for the GOFBCI Office Study; **OR**
  - both.

The use of a subcontractor(s) for all or parts of the feasibility studies is acceptable, provided the subcontractor meets the mandatory vendor qualifications.

**Vendors which do not meet 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(s) expected to result from this RLB, ODJFS requires that interested vendors provide the following:

1. Samples of two reports completed for similar projects during the past five years that demonstrate the staff/team expertise necessary to successfully accomplish the project(s); and
2. Names and contact information for at least two entities for which the vendor and/or the vendor's subcontractor(s) has/have performed similar large scale projects in the past five years.

### **C. Staff Experience and Capabilities**

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

1. Identify, by position and by name, those staff the vendor considers key to the project's success. At minimum, key staff identified must include a project manager for each of the three feasibility studies for which the vendor is submitting a proposal.
2. Include resume(s)/curricula vitae of key staff expected to work on the project. These projects demand a team or teams (if the proposal includes subcontractors and/or two or more of the three feasibility studies sought in the RLB) that can demonstrate the following:

If responding to provide the feasibility study for The Inventory and/or The Web-based Tool with GIS component:

- excellent written and verbal communications skills;
- experience in designing, installing, supporting, and troubleshooting e-commerce, e-matching, and/or e-philanthropy web-based networks;
- experience in web graphics, styles, layout, and navigation;
- experience with GIS hardware and software and in developing and maintaining GIS applications;
- experience in planning and conducting user tests and documenting and responding to the results;
- experience in conducting research and staying current in the best practices and emerging technologies of web-based design and implementation;
- experience in collaborating with clients and all project stakeholders, including IT staff, project managers, and end users; and
- experience in identifying needs and recommending timely solutions to satisfy technological and budgetary constraints.

If responding to provide the feasibility study for The GOFBCI Office study:

- excellent written and verbal communications skills; and
- a bachelor's degree in public policy, public affairs, organizational structure, strategic planning, privatization, political science, organizational management, marketing, public relations, communications, planning, strategic planning, business, or business management or in a related area of study.

Resumes/CVs must document a minimum of two years of relevant project experience for each key staff member.

## **VI. Scope of Work**

This project includes the completion and delivery of three (one, two or all) comprehensive feasibility studies for GOFBCI on the following subjects:

### **1) The creation of a state-wide digital Inventory of faith-based and community-based non-profits.**

#### **The Inventory**

GOFBCI recognizes that resources available to help those in need are limited. For this reason, many have turned to cross-sector collaboration with the private and nonprofit sector to achieve important public policy objectives. These partnerships allow leaders to leverage and maximize Ohio's available resources in order to better serve those in need.

Faith-based community organizations, in particular, are a potentially valuable partner for local and state leaders because of the unique strengths and resources they bring to community development efforts. Faith-based and community-based organizations are generally rooted in a community, delivering services where people live. They provide access to large numbers of Ohioans, with as many as seven in ten participating with some faith-based organization. These faith-based and community-based groups also provide access to financial and human capital and are likely to have a real passion for service.

Civic and governmental leaders would be well served by a more comprehensive listing of the faith-based and community-based nonprofits throughout Ohio. This Inventory would be a useful tool for these leaders new to partnerships with the faith-based and community-based nonprofits. This strategic Inventory tool is intended to help political and civic leaders better understand where the interests and activities of their community's faith-based and community-based nonprofits align with local and state policy objectives.

The state-wide Inventory will provide these leaders with an easy-to-understand tool that provides a starting point for assessing potential collaboration with faith-based and community-based nonprofits.

This state-wide Inventory would include an easy-to-use digital database of faith-based and community-based non-profits. Information on each non-profit in the database would ideally consist of the following data points:

- general contact information,
- mission statement,
- capacity assessment (i.e. large, mid-sized or small),
- service-related programs (i.e. reentry, mentoring, summer food sites, referral, etc.),
- issue focus (healthcare, public safety, reentry, etc.),
- geographic scope of services, and
- public funding (yes/no, sources, amounts).

Additional data points may be recommended.

The Inventory would be accessible to faith-based and community-based non-profit groups interested in partnering with other organizations to deliver services and to local, state, and federal agencies and/or offices interested in partnering with faith-based and community-based non-profits. Initial data collection should include, but would not be limited to the following sources: the United Way, 211 searchable databases, universities and colleges, the Ohio Secretary of State, Guidstar.org, Ohio mayors and other elected officials, yellow pages, community foundations, and existing GOFBCI files. The Inventory will be housed within GOFBCI. The Inventory would also provide the necessary contact information for the Web-based Tool and GIS component described in Section 2, below.

The scope of work for the Inventory project includes:

1. Research and data collection to answer questions including, but not limited to:
  - How best to approach the Inventory project, including a list of all the necessary steps GOFBCI must take to execute the project;
  - How best to provide on-going management of the project, including structural and staffing needs, necessary resources, and all other recommendations;
  - What challenges GOFBCI might face as they relate to the project;
  - What are all the possible advantages and disadvantages of the projects;
  - What to expect in terms of both the initial and ongoing costs associated with the project;
  - What are the possible state, federal and private funding sources available for the project;
  - Which firms or organizations are in the best position to create the Inventory projects;
  - What marketing and outreach efforts are advised, and at what cost?
2. Data analysis for the Inventory feasibility study should include, but is not limited to:
  - Descriptions of all successful models and/or projects encountered in the research and data collection phase and
  - Comparisons of the pros and cons of each model and/or project.
3. A report of not more than twenty (20) pages, including a title page, abstract, methodology, narrative, conclusions, recommendations, and references, will be completed.

**2) The creation of a Web-based Tool connecting Ohio's faith-based and community-based non-profits with resources (i.e. funding, donors, training opportunities) as well as connecting volunteers with volunteer opportunities.**

### **The Web-based Tool with GIS component**

Technology has enabled radical improvements in business and education but has been slow to affect the nonprofit and faith-based sector due to its lack of financial resources and often dated or non-existent technological infrastructure. Smaller organizations and many faith-based programs do not have the organizational capacity or infrastructure to develop and maintain productive, informative websites or to create web-based platforms that attract meaningful partnerships and

larger numbers of volunteers or donors. This new tool will provide that capacity, leading to more effective, sustainable nonprofits meeting needs in Ohio.

This Web-based Tool would be designed to better match resources with needs – connecting people and organizations looking for help with people and organizations looking to help. The Web-based Tool would include a GIS component, allowing users across the state to create customized maps depicting areas of need in relation to the locations of existing service-providers.

Using this GOFBCI Web-based Tool, these organizations can create their own pages explaining what they do, why they do it, how one might donate time or money, and how other like-minded organizations might partner in their efforts. Once the authenticity of the organization or program has been verified, the page goes live and the organization instantly becomes part of a searchable database of opportunities utilized by tens of thousands of people and organizations throughout the state. The multi-faceted site will provide a one-stop solution for community works from incubation through execution and will facilitate:

- **Connections** – Organizations looking for partners and individuals looking to volunteer do not currently have an exciting, interactive and inspiring *web-place* to go to find like-minded organizations or something that fits their unique volunteer interests. An altogether unique search engine will allow organizations and people to learn more about opportunities – with a simple click of a button. Having created a “personal” profile, organizations and volunteers will have messages sent to their page and/or their e-mail each time a new opportunity arises that fits within the profile they have created.
- **Capacity Building** – This site will not only help organizations, programs, and individuals connect with one another – it will also help to build capacity. Useful links will connect organizations to capacity building opportunities in their areas as well as providing on-line information covering board development, outcome management, human resource and volunteer management, fund development, grant writing, internal fiscal control, and more. Organizations will also find here funding opportunities – both public and private. Organizations and programs can also access a menu of on-line tools, such as the GOFBCI’s RSVP system, on their own page – making it easier to coordinate volunteer events, and volunteers can sign up on an organization’s page to learn more about the organization and its offerings using the GOFBCI e-newsletter system.
- **Collaboration** - An interactive bulletin board will allow organizations to post ideas, gain feedback, and find others who have potentially tackled similar issues or are actively attempting to launch similar efforts. With SharePoint type technology, individuals can search threads and leapfrog learning instead of investing time and resources re-inventing the wheel. Information sharing will accelerate efficiency and impact.
- **Fundraising** – The site will serve as a conduit for donors to learn more about unique faith-based and community-based organizations that are in need of funding and then to contribute and track their selected organizations’ progress. In fact, progress reports will be sent to each donor’s personalized page. Organizations will also learn more about grant opportunities.
- **Recognition** – Editorial content on the web will publicize project or program successes, best practices, and other information to recognize some of the important work being pursued around the state.
- **Data Analysis/Needs Assessment** – GIS has proven to be a powerful tool for storing and retrieving data in a spatial context. Access to individually defined, customizable GIS technology allows users to map areas of need, locations of existing service-providers, and the lack of specific services. The end product is a persuasive tool for many audiences, including funders and investors. Furthermore, this technology can help

organizations to quantitatively identify community needs and manage them. The same capability GIS has provided to financially secure organizations to accomplish their missions will be available to every faith-based and community-based organization in Ohio, regardless of its size.

The scope of work for the Web-based Tool with GIS component project includes:

1. Research and data collection to answer questions including, but not limited to:
  - How best to approach the Web-based Tool with GIS component project, including a list of all the necessary steps GOFBCI must take to execute the project;
  - How best to provide on-going management of the project, including structural and staffing needs, necessary resources, and all other recommendations;
  - What challenges GOFBCI might face as they relate to the project;
  - What are all the possible advantages and disadvantages of the projects;
  - What to expect in terms of both the initial and ongoing costs associated with the project;
  - What are the possible state, federal and private funding sources available for the project;
  - What are the characteristics of organizations best positioned to create the Web-based Tool with GIS component project;
  - What marketing and outreach efforts are advised, and at what cost?
2. Data analysis for the Web-based Tool with GIS component feasibility study must include, but is not limited to:
  - Descriptions of all successful models and/or projects encountered in the research and data collection phase and
  - Comparisons of the pros and cons of each model and/or project.
3. A report of not more than twenty (20) pages, including a title page, abstract, methodology, narrative, conclusions, recommendations, and references, will be completed.

**3) The advisability of the Governor's Office of Faith-Based and Community Initiatives (GOFBCI) becoming a private nonprofit entity rather than a part of the governor's office, or a combination of the two.**

**GOFBCI Office Study**

The General Assembly's recently passed budget included language requiring the Governor's Office of Faith-Based and Community Initiatives, with the assistance of the Advisory Board of the Governor's Office of Faith-Based and Community initiatives, to conduct a study of and to make recommendations regarding the feasibility and advisability of the Office becoming a private nonprofit entity rather than a part of the Governor's office. It will make recommendations regarding the most feasible organizational framework for GOFBCI— either housed in its current location as part of the Governor's office, or as a private nonprofit entity, or a combination of the two.

Various states have successful models of each aforementioned scenario, which should be examined. There are both advantages and disadvantages associated with each scenario, which also should be examined.

The scope of work includes:

1. Research and data collection to include, but not limited to:
  - interviews with the current and past directors of the Ohio Governor's Office of Faith-Based and Community Initiatives (GOFBCI);
  - interviews with current and former staff members of the GOFBCI office;
  - interviews with current members of the GOFBCI Advisory Council, with special emphasis given to interviewing those members who have served from the inception of the GOFBCI;
  - interviews with past members of the Ohio GOFBCI Advisory Council;
  - interviews with staff and board members at faith-based/community-based initiative offices in other states; and
  - a literature review of the structures of faith-based/community-based initiative offices in other states.
2. Data analysis to include, but not limited to:
  - a description of all organizational models encountered in the research and data collection phase;
  - a comparison of the pros and cons of each model; and
  - a description of all factors found to be critical or unique to Ohio as they relate to the organization and operation of a faith-based/community-based initiatives office.
3. A report of not more than twenty (20) pages, including a title page, abstract, methodology, narrative, conclusions, recommendations, and references, will be completed.

## **VII. Specifications of Deliverables**

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

### **1) The Inventory**

Deliver to GOFBCI no later than August 15, 2008 ten (10) copies of the results of the Inventory feasibility study - a report of not more than twenty (20) pages, including a title page, abstract, methodology, narrative, conclusions, recommendations, and references.

The report will provide:

- a cost estimate for the creation of the state-wide digital Inventory of faith-based and community-based non-profits;
- the estimated annual cost to maintain the state-wide digital Inventory of faith-based and community-based non-profits;
- descriptions of all successful models and/or projects encountered in the research and data collection phase;
- a description of the possible advantages and disadvantages of the project; and
- comparisons of the pros and cons of each model and/or project.

The report will recommend:

- the best approach for the Inventory project, including a list of all the necessary steps GOFBCI must take to execute the project;

- a classification system to determine the size of the faith-based and community-based non-profit groups that will participate;
- data points to be collected;
- a method to verify the authenticity of the organization or program that will participate;
- a method to secure any sensitive data collected;
- firms or organizations in the best position to create the Inventory project;
- marketing and outreach efforts and the projected cost of each;
- plans to overcome the challenges GOFBCI might face as they relate to the project;
- a system to provide the best ongoing management for and upkeep of the database, including structural and staffing needs, necessary resources, and all other recommendations; and
- funding sources to implement and maintain the database.

## **2) The Web-based Tool with GIS component**

Deliver to GOFBCI no later than August 15, 2008 ten (10) copies of the results of the Web-based Tool with GIS component feasibility study - a report of not more than twenty (20) pages, including a title page, abstract, methodology, narrative, conclusions, recommendations, and references.

The report will provide:

- descriptions of all successful models and/or projects encountered in the research and data collection phase;
- comparisons of the pros and cons of each model and/or project;
- a description of the possible advantages and disadvantages of the project;
- a cost estimate for the creation of the a Web-based Tool with GIS component; and
- the estimated annual cost to maintain the Web-based Tool with GIS component.

The report will recommend:

- the best to approach the Web-based Tool with GIS component project, including a list of all the necessary steps GOFBCI must take to execute the project;
- plans to overcome the challenges GOFBCI might face as they relate to the project;
- a method to secure any sensitive data collected;
- a system to provide the best ongoing management for and upkeep of the Web-based Tool with GIS component, including structural and staffing needs, necessary resources, and all other recommendations;
- firms or organizations in the best position to create the Web-based Tool with GIS component project;
- marketing and outreach efforts and the projected cost of each;
- funding sources to implement and maintain the Web-based Tool with GIS component; and
- a proposed fee schedule for users, including justifications for proposed fees.

## **3) The GOFBCI Office Study**

Deliver to the GOFBCI no later than August 15, 2008 ten (10) copies of the results of a study and make recommendations regarding the feasibility and advisability of the Governor's Office of Faith-Based and Community Initiatives remaining a part of the governor's office, becoming a private nonprofit entity rather than remaining a part of the governor's office, or being structured and managed as a combination of the two. The report will include, but is not limited to, a description of all organizational models encountered in the research and data collection phase; a comparison of the pros and cons of each model; and a description of all factors found to be critical or unique to Ohio as they relate to the organization and operation of a faith-based/community-based initiatives office. The results will be in the form of a written report of not more than twenty (20) pages to include: a title page, abstract, methodology, narrative, conclusions, recommendations, and references.

### **VIII. Vendor Compensation**

Vendors are to propose their firm, fixed, all-inclusive cost for each of the three studies. The proposed price will represent the entire cost the vendor offers for the full and successful completion of the three studies 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 costs in this RLB. No separate travel expenses or any other type of expenses will be paid under the contract to result from this RLB.

### **IX. Format of Submission**

To be accepted and forwarded to the ODJFS Proposal Review Team (PRT), the vendor's proposal must include a signed original and 5 copies of a technical proposal, and a non-rewritable CD-ROM copy of the entire original technical proposal, according to the format and composition details provided below. Should any vendor wish to be considered for performance of more than one of the three separate studies, that vendor must include a separate, complete proposal (including all required copies) for each study, and each proposal must be labeled for the type of study it addresses.

- Technical Proposal. One original and 5 copies of the Technical Proposal labeled: **“TECHNICAL PROPOSAL ENCLOSED FOR ADMINISTRATIVE CONSULTATION SERVICES PROJECT, RLB#: R-89-01-0973 FOR (INVENTORY, - OR - GIS, - OR - GOFBCI OFFICE) STUDY SUBMITTED BY (VENDOR NAME AND DATE OF SUBMISSION).”**
- One non-rewritable CD-ROM containing a copy of the entire Technical Proposal labeled: **“CD-ROM FOR ADMINISTRATIVE CONSULTATION SERVICES PROJECT, RLB#: R-89-01-0973 (STUDY TYPE) 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 only.

The vendor's Technical 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 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 Technical 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:

- 1.) “Required Vendor Information and Certifications” form (provided as Attachment A to this RLB);
- 2.) “Request for Taxpayer Identification Form W-9” (provided as Attachment B to this RLB); and,
- 3.) 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 technical 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 all documents and 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.), including, at minimum:

- Names and contact information for at least two entities for which the vendor and/or the vendor’s subcontractor(s) has/have performed similarly-sized projects in the past five (5) years.
- A list of individuals, by position and by name, of those staff the vendor considers key to the project’s success; the list must identify a project manager for each of the three feasibility studies for which the vendor is submitting.
- Resumes or curricula vitae of key staff.

**Sub-Tab 2c.** Staff Experience and Capabilities (Section V, C.)

**Tab 3: Scope of Work and Specifications of Deliverables** The vendor proposal must describe in detail the approach to be taken, and general work plan to be implemented, to fully and successfully complete the scope of work and deliverables described in Section VI and VII. The description of how the vendor would, if awarded a contract, approach the work and complete the studies to the satisfaction of GOFBCI will be fully evaluated as a part of the vendor selection process, and therefore must be clear, complete, and informative.

**X. Selection Process**

All proposals will be reviewed and scored by a Proposal Review Team (PRT) comprised of GOFBCI and/or ODJFS staff. Vendors should not assume that the review team members are familiar with any current or past work activities with the State. 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 two phases: Phase I—Initial Qualifying Criteria, and Phase II—Scoring of the Technical 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 Technical Proposal Score Sheet, which is provided as Attachment D. to this RLB. As GOFBCI has identified the price it will pay the selected vendor or vendors for each satisfactory study, cost proposals are not required for this process and cost is NOT a consideration in the vendor selection.

## **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, Instructions for Format of Applications**, 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 (see Section XIII, B.).

### **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 technical 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 provided as Attachment D to this RLB. 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 Submissions.

**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://www.state.oh.us/odjfs> 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 XIII, 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 3:00 p.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 a contract, the protest shall be filed no later than 3:00 p.m. of the *tenth (10th) calendar day* after the issuance of the Letter of Intent to Award the contract.
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**

### **Attachments**

- A. Required Vendor Information and Certifications** (To be completed & included in proposal packet as specified in Sec. XX)
- B. Request for Taxpayer Identification Number (W-9) Form** (To be completed & included in proposal packet as specified in Sec. XX.)

- C. **Declaration of Material Assistance Form** (To be completed & included in proposal packet as specified in Sec. XX.)
- D. **Technical Proposal Score Sheets** (For vendor self-evaluation purposes...do not submit)

## Appendices

- A. The following article by Jeremy Caplan and Kristina Dell can be found in the series “The Case for National Service” at the Time website:  
[http://www.time.com/time/specials/2007/article/0,28804,1657256\\_1655085\\_1654848,00.html](http://www.time.com/time/specials/2007/article/0,28804,1657256_1655085_1654848,00.html)
- VolunteerMatch**  
**Founder:** Jay Backstrand and Craig Jacoby  
**When:** 1998 in Palo Alto, Calif.  
**Website:** [volunteermatch.org](http://www.volunteermatch.org/) <http://www.volunteermatch.org/>  
**Bright Idea:** Use the Internet to connect those who are interested in community service with organizations in need of volunteers.  
**Impact:** This search engine for volunteerism has made more than 3 million referrals to socially responsible Web surfers. Some 52,000 nonprofit organizations recruit help through the site.
- The Next Wave:** Other nonprofits are finding new ways to harness the Web to leverage the talents and enthusiasm of volunteers.
- Donors Choose:** <http://www.donorschoose.org/homepage/main.html>  
 Teachers submit online requests for materials and activities for their students. Donors search the site to decide which ones to fund.
- SmartVolunteer:** <http://www.smartvolunteer.com/UI/NonMembers/default.aspx>  
 This site takes VolunteerMatch a step further by letting people search for projects that require specific skills, such as accounting or medical training. Programmers and students created it pro bono; almost 200 organizations are using it.
- Idealist.org:** <http://www.idealist.org/>  
 This online supermarket for social action, matching people with ideas, jobs, news and resources, was founded by Ashoka fellow Ami Dar.
- Change.org:** <http://www.change.org/>  
 Mini social networks gather people around an issue to build virtual foundations. Users can bundle donations and coordinate e-mail lobbying or fund-raising efforts with data from VolunteerMatch and Idealist.org.
- Kiva.org:** <http://www.kiva.org/>  
 A market for micro-lending on the Web, Kiva helps small lenders (as little as \$25) make loans to borrowers trying to start or expand businesses in developing countries.
- B. An example of a site for creating a very practical yet sophisticated Web site.  
 -eWedding.com: <http://ewedding.com/>
- C. Other web design sites for nonprofits:  
 -MyCharityWeb: <http://www.mycharityweb.com/mycharityweb/>  
 -FreeWebs: <http://non-profit.webs.com/>  
 -Altrueistic- <http://www.altrue.com/templates/System/default.asp?id=39153>  
 Easy website for nonprofits

