

**CHILD SUPPORT  
NEW HIRE REPORTING SERVICES RFP**

**RFP#: R-89-09-0740**

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**ODJFS REQUEST FOR PROPOSALS (RFP):**  
**New Hire Reporting**  
**RFP#: R-89-09-0740**

**SECTION I.           GENERAL PURPOSE & VENDOR INFORMATION**

**1.1     Purpose**

The Ohio Department of Job and Family Services (ODJFS) releases this Request for Proposals (RFP) for the purpose of selecting a single vendor who will operate Ohio's New Hire Reporting Center. In Ohio, all employers are required to report newly hired employees to a state directory, which is a key component of Ohio's systematic efforts to collect child support owed by non-custodial parents. The selected vendor will also be required to monitor employer compliance with new hire regulations.

The vendor to be selected through this RFP process will be required to provide data entry and related administrative services to operate Ohio's employer New Hire Reporting Center. The vendor must be capable of providing data entry services for approximately three million new hire reports annually, in accordance with ODJFS standards for speed and accuracy; and of providing customer service to over 300,000 employers by using customer call center staff. Approximately 600 telephone calls and 180 e-mails per month are received by Ohio's current New Hire Reporting Center.

**1.2     Issuing Office**

This RFP is released by and the subsequent contract will be with ODJFS. The Office of Child Support (OCS) will administer the contract, and will be responsible for state level supervision of all activities of the selected vendor. OCS provides leadership, structure, and resources to advance the child support program in Ohio.

If interested vendors have a need to communicate regarding this RFP, they must contact **ODJFS** using one of the mechanisms provided for in **Sections 1.7, Internet Question and Answer Period/RFP Clarification Opportunity, or 1.9, Communications Prohibited**, of this RFP. Vendors are cautioned that communication attempts which do not comply with these instructions will not be answered, and that ODJFS will not consider any proposals submitted to any address other than the one provided in Section 4.1 of this RFP. Vendor proposals must be submitted to ODJFS in strict accordance with proposal submission instructions provided in **Section 4.1, Proposal Submission**.

**1.3     Background**

Ohio's system of human services delivery is state supervised and county administered. ODJFS is the designated State of Ohio agency responsible for administering the Title IV-D section of the Social Security Act. Within ODJFS, OCS is charged with IV-D responsibilities, including parent location; paternity and support establishment; and enforcement of administrative and court-ordered child and medical support.

Ohio Revised Code 3121.89 through 3121.8911 and the federal Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) 42 USC 653a require all employers to report newly hired employees to a state directory. Ohio first implemented the new hire program on January 1, 1996, although various state and federal law changes have occurred since that time. With the passage of House Bill (HB) 180 in March 2001, the new hire reporting requirement was extended to also include those employees who are independent contractors (ORC 3121.89 (A)).

Studies have shown that a large number of child support obligors change jobs frequently, sometimes resulting in months of delay before income withholding can be implemented. The new hire program expedites income withholding for many ODJFS Support Enforcement Tracking System (SETS) cases.

#### **1.4 Overview of the Project**

The work performed by the New Hire Reporting contractor is a linchpin component of the ODJFS Child Support collections program. Employers must report newly hired or rehired employees to the new hire center within twenty days of the hire date. The New Hire Reporting contractor must then enter the new hire/re-hire information in their database within five days and forward the file containing standard new hire information to the ODJFS Office of Management Information Services (MIS) no later than the next business day. The New Hire Reporting contractor shall transmit independent contractor information once a month to ODJFS; such transmissions must be completed prior to the end of the month following completion of the work. Both transmissions must be in the format prescribed by OCS.

The transmission made by the current vendor arrives at ODJFS via text file that goes through a File Transfer Protocol (FTP) server. ODJFS reserves the right to alter the type of electronic transmission at any point during the contract. Expenses relating to adjustments to the type or frequency of transmissions are the responsibility of the contractor.

#### **1.5 Objectives of the Project**

The objective of the ODJFS New Hire Reporting program is to quickly disseminate information on newly hired and rehired employees to Child Support Enforcement Agency (CSEA) staff in Ohio in order to expedite income withholding for the purpose of collection of child support from obligors. Information obtained from new hire reports may also aid in the location of individuals who are being sought to pay child support. Additionally, Ohio law allows new hire information to be used to detect fraud in any program that ODJFS administers.

The primary objectives for the ODJFS New Hire Reporting contract are:

- to establish and utilize comprehensive and effective processes for the receipt, processing, and retention of employers' new hire data, received via paper mail, fax transmission and on-line processes;
- to provide ongoing access to the new hire program, and to provide technical assistance for employers and child support enforcement staff, using, at minimum, e-mail, call-center and website; and forwarding to ODJFS those information requests or other communications which exceed the contractor's purview;
- to perform matching and follow-up functions to maximize employer new hire reporting compliance; and

- to provide ODJFS with ongoing, regular, and as-needed communications on the status of the project and its activity through, at minimum, monthly reports, and if necessary, site visits may occur periodically.

**1.6 Anticipated Procurement Timetable**

DATE	EVENT/ACTIVITY
October 19, 2007	ODJFS Releases RFP to Potential Vendors on ODJFS Website; Q&A Period Opens - RFP becomes active - Vendors may submit inquiries for RFP clarification
Nov. 05, 2007	Vendor Q&A Period Closes, 10 a.m. (for inquiries for RFP Clarification) - No further inquiries for RFP clarification will be accepted
Nov. 13, 2007	ODJFS provides Final Vendor Question & Answer Document
<b>Nov. 27, 2007</b>	<b>Deadline for Vendors to Submit Proposals to ODJFS (3 p.m.)</b> - This is the proposal opening date, beginning the ODJFS process of proposal review
December 12, 2007	ODJFS Issues Contract Award Notification Letter (estimated) - Vendors that submitted proposals in response to this RFP will be sent letters stating whether their proposal was accepted for award of the contract
January 14, 2008	Controlling Board Review of Contract (estimated—if applicable). -Contract with the selected vendor requires review and approval
February 4, 2008	Implementation* (estimated—following notification of all contractual and funding approvals) - ODJFS contracts are not valid and effective until the state Office of Budget Management approves the purchase order.
June 30, 2009	Original Contract End Date (Note: contract may be renewed through June 30, 2011)
June 30, 2011	Project Completion** - All work must be completed and approved by ODJFS Contract Manager

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.

\*\* Subject to approval by the Controlling Board, the contract period is expected to run from approximately early February, 2008 through June 30, 2009, with the possibility of renewal through June 30, 2011. Renewal may be subject to approval by the Controlling Board, continuing programmatic need, and satisfactory contractor performance. Should funding necessary for this project become unavailable at any time during the effective term of the contract, the contract shall be canceled in accordance with standard contract provisions.

### **1.7 Internet Question & Answer Period; RFP Clarification Opportunity**

Potential vendors may ask clarifying questions regarding this RFP via the Internet during the Q&A Period as outlined in Section 1.6, 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 Us” on the front page;**
- \* **Select “Doing Business with ODJFS;”**
- \* **Select “Requests for Proposals, Letterhead Solicitations, and Other Invitations;”**
- \* **RFP Number [R89090740](#);**
- \* **Select “Ask a Question about this RFP” function; and**
- \* **Follow the instructions to send an e-mail question.**

Questions about this RFP must reference the relevant part of this RFP, the heading for the provision under question, and the page number of the RFP where the provision can be found. The potential vendor must also include the name of a representative of the potential vendor, the company name and business phone number. ODJFS may, at its option, disregard any questions which do not appropriately reference an RFP 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 the Q&A period closes.

ODJFS responses to all questions asked via the Internet will be posted on the Internet website dedicated to this RFP, 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 Q&A Document” for this RFP. If possible, ODJFS will post an interim Q&A Document, without identifying the vendors asking questions, as well as the final version (in which all vendors that posed questions will be identified). ODJFS strongly encourages vendors to ask questions as early as possible in the Q&A period so that interim answers can be posted with sufficient time for the possibility of vendors’ follow-up questions.

Vendor proposals in response to this RFP are to take into account any information communicated by ODJFS in the Final Q&A Document for the RFP. **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 this RFP.**

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

**IMPORTANT:** Requests from potential vendors for copies of previous RFPs, 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 RFP. PRRs submitted in accordance with directions provided in Section 1.9, Communication Prohibitions, will be honored. The posted time frames for ODJFS responses to Internet questions for RFP clarification do not apply to PRRs.

Vendors are to base their RFP responses, and the details and costs of their proposed projects, on the requirements and performance expectations established in this RFP for the future contract, NOT on details of any current or past related contract. 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 RFP. 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. Interested vendors should also refer to RFP Section 1.10, Time Frames and Funding Source, for related information.

There is an established time period for the Vendor Q&A process (see Section 1.6, Anticipated Procurement Timetable, above). ODJFS will only answer those questions submitted within the stated time frame for submission of vendor questions, and which pertain to issues of RFP clarity, and which are not requests for public information. ODJFS is under no obligation to acknowledge questions submitted through the Q&A process if those questions are not in accordance with these instructions.

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

## **1.8 Vendor's Library**

There is no specific library of documents, reports, or other information that vendors interested in this RFP should consider. However, a wide variety of information on ODJFS and its programs which interested vendors may find useful is available to the public via the ODJFS website at <http://jfs.ohio.gov>.

## **1.9 Communication Prohibitions**

From the issuance date of this RFP until an actual contract is awarded to a vendor, there may be no communications concerning the RFP between any vendor that expects to submit a proposal 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 RFP or the selection of the contractor.

The only exceptions to this prohibition are as follows:

1. Communications conducted pursuant to Section 1.7, Internet Q&A Period;
2. As necessary in any pre-existing or on-going business relationship between ODJFS and any vendor that could submit a proposal in response to this RFP;
3. As part of any vendor interview process or proposal clarification process initiated by ODJFS, which ODJFS deems necessary in order to make a final selection;

4. If it becomes necessary to revise any part of this RFP, ODJFS will post those revisions, amendments, etc., to the website dedicated to this RFP;\* and
5. Any Public Records Request (PRR) made through the ODJFS Office of Legal Services.

\* **Important Note:** Amendments to the RFP or to any documents related to it will be accessible to interested vendors through the original web page established for the RFP. All interested vendors must refer to that web page regularly for amendments or other announcements. ODJFS may not specifically notify any vendor of changes or announcements related to this RFP except through the website posting. It is the affirmative responsibility of interested vendors to be aware of and to fully respond to all updated information posted on this web page.

ODJFS is not responsible for the accuracy of any information regarding this RFP that was obtained or gathered through a source other than the Q&A process described in this RFP. Any attempts at prohibited communications by vendors may result in the disqualification of those vendors' proposals.

#### **1.10 Time Frames & Funding Source**

ODJFS is seeking to contract with a vendor to perform data entry functions for approximately 3 million new hire reports each year from early February, 2008 to June 30, 2009. The contract with the selected vendor may be renewed for the period of July 1, 2009 through June 30, 2011; however, as state law prohibits ODJFS from making financial commitments beyond the fiscal biennium (*i.e.*, June 30, 2009), such renewal is contingent upon the availability of funds and satisfactory performance by the vendor, and is subject to approval by the Controlling Board.

Potential vendors are to be aware that ODJFS may, at its sole discretion, negotiate with all technically qualifying vendors for a revised cost proposal if the cost proposals of all technically qualifying vendors are in excess of the available funding for this project. Section VI., 6.1 C. of this RFP establishes further information on ODJFS procedures to be implemented if this occurs.

All ODJFS contracts are for specified periods of time, and certain contracts include designated limited periods for renewal. Currently, ODJFS has a vendor under contract for New Hire Reporting services until December 31, 2007. All qualified vendors are invited to submit proposals in response to this RFP, including the current New Hire Reporting contractor.

## **SECTION II. VENDOR EXPERIENCE AND QUALIFICATIONS**

The purpose of Section II of the RFP is to establish mandatory vendor qualifications and experience requirements. Proposed projects submitted in response to this RFP must fully and clearly address all requirements and expectations expressed in this Section II, and must also clearly address the vendor responsibilities stated in this RFP's Section 1.4, Overview of the Project, and its objectives as established in Section 1.5, Objectives of the Project.

Vendors' proposals must meet the following minimum qualifications, and must adequately address the specified need for organizational and staff experience and capabilities.

### **2.1 Required Minimum Vendor Qualifications**

In order to be considered for the contract expected to result from this RFP, ODJFS requires that interested vendors **must** meet, at minimum, **both** the following qualification requirements:

- a. ODJFS will only consider proposals from vendors with a minimum of five years experience in data entry projects that require the processing of at least two million reports each year.
- b. The vendor must also exhibit at least three years experience in managing a call center responsible for answering at least 600 calls per month and responding to 180 e-mails per month.

Proposals from vendors that do not demonstrate to the satisfaction of ODJFS that they meet these above two criteria will be disqualified.

### **2.2 Organizational Experience and Capabilities**

ODJFS requires that interested vendors provide the following:

- a. Description of the vendor's experience, in private and/or public settings, in creating, operating, and managing projects similar to the New Hire Reporting Center in size, scope, and necessary responsibility level, as described in this RFP;
- b. Descriptions of at least three, but no more than four, similar sized projects completed in the past five years that demonstrate expertise in handling between 2 and 3 million reports for data entry annually. The vendor must also have demonstrated experience in maintaining a call center that responds to approximately 600 calls and 180 e-mails per month.

### **2.3 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 or curriculum vitae. The vendor must, at minimum:

- a. Designate a project manager who has a minimum of three years management experience; a bachelor's degree in business administration, public administration, social sciences or

other related field. The designated project manager should have at least two years experience in managing data entry and call center staff for a high volume operation;

- b. Identify, by position and by name, any additional staff they might consider key to the project's success; and include resumes for those persons. Key staff must have at least a four year degree in a related field.

### **SECTION III. SCOPE OF WORK & SPECIFICATIONS OF DELIVERABLES**

Interested vendors are to view the RFP's specifications for the deliverables which will be required of the selected vendor as the underlying frame work for vendors' proposals. Proposed projects will be evaluated by ODJFS not only on whether a qualified vendor agrees to the required deliverables, but on how well and how fully their proposals indicate they will perform those deliverables, and on how effectively and efficiently the proposed project will meet the project's objectives and serve Ohio's needs. The selected vendor will be responsible for the deliverables as described in Section 3.3 including all preparatory and intervening steps, whether or not ODJFS has explicitly specified or delineated them within the RFP, and therefore vendors must fully and appropriately plan and cost out their proposed projects accordingly.

#### **3.1. Scope of Work**

The following information is a summary of the duties and responsibilities of the selected New Hire Services contractor. In addition to describing their approaches for work responsibilities set forth in this Section 3.1, 1 through 13, vendor proposals must fully address the following requirements, at minimum, describing clearly how the vendor would accomplish these requirements if awarded the contract. The vendor must provide a detailed description of how it will define and perform each of the duties, and, if applicable, will develop and manage services performed under any and all subcontracting arrangements. Vendor responses should be organized to correspond with the order of the following scope of work categories. In order to receive consideration for contract award, all aspects of the requirements described in this section must be addressed in the vendor's technical proposal.

##### **1. General Requirements:**

The selected vendor will be responsible for establishing and maintaining one New Hire Reporting Center, physically located in Ohio. The New Hire Reporting Center is to be adequately staffed on a daily basis and led by a project manager who will work with the ODJFS contract manager to oversee operations. **If as a result from this RFP the contract is awarded to a vendor other than the current contractor, the new vendor may be required to perform any readiness activities (i.e. office set-up; obtaining/transferring P.O. Box, phone and fax lines; readiness to accept reports from current vendor not yet processed; website ready to allow vendor reporting on first day of operation; etc.) under a no-cost contract, which could be in effect within fourteen calendar days following formal announcement of the contractor selection.**

The selected vendor shall be responsible for, at minimum, complete office set-up; programming design, development, and testing; data preparation (opening mail, date stamping, proofing of documents); monitoring documents that must be returned to employers for additional information or corrections; entry of employer data within five

days of receipt (reporting forms include JFS 07048, other pertinent forms created by ODJFS, fax, Internet, or electronic media); magnetic media processing; report processing; production, postage, and notice generation; imposing sanctions (under the direction of OCS); fee collection from non-compliant employers; supplying of all correspondence and mail supplies; fax lines; Internet lines; toll-free phone and fax lines; and, maintaining and storing employer addresses. The contractor will be responsible for managing and documenting the scope of work, making ODJFS administration aware of conflicts and issues affecting project operations and developing recommendations for the resolution of issues.

ODJFS will provide the contractor with an employer file that contains the names and addresses of employers conducting business within the state and of multi-state employers who have chosen to report to Ohio. As soon as possible following contract execution the contractor will send informational correspondence packets to employers (not to exceed six double-sided pages) notifying them of any changes in new hire operations. ODJFS will have final approval on text and design of information provided in the mailing. Contractor will be responsible for all preparation and mailing functions and costs.

Any necessary training of vendor employees regarding phone etiquette, data entry, monitoring return reports, monitoring e-mails, dealing with difficult customers, etc. is the responsibility of the vendor. A copy of all training material should be available to ODJFS upon request.

## **2. Processing of New hire Reports:**

The selected New hire Reporting vendor will be responsible for processing approximately three million reports per year; for the period of July 1, 2006 to June 30, 2007, 2.9 million reports were processed, approximately 78% of those were submitted electronically. Roughly two thirds of employers are currently reporting electronically (*e.g.*, Internet, disc, CD, flat file). The contractor will be required to have the capability of handling such transmission volume and of handling all other types of transmissions as well.

The project requires the selected vendor to establish an operations center that is capable of date-stamping and data-entering all new hire reports within five days of receipt of the record, regardless of the method utilized by the employer, and in turn, transmitting the data from employers that are not independent contractors no later than the next business day (except for State holidays) to ODJFS. Once per month, the contractor must transmit to ODJFS all independent contract information received that month. With all of Ohio's approximately 300,000 employers required to report, the contractor should anticipate at least 57,000 records per week. The selected vendor will be required to obtain and retain information (as specified in Section 3.1 (3).) from each report. The vendor proposal must describe how they are capable of processing this weekly and annual report volume and at the required accuracy rate of 99.8% on data entry work. About 1,200 reports are returned to the contractor each month for corrections, usually involving missing or illegible information, which the contractor must then secure by contacting the employer. Any reporting errors such as missing or illegible information will be returned to the contractor for correction, including when necessary, contacting the employer for clarification. The contractor must process employer reports regardless of submission medium (*e.g.*, data is entered, scanned, downloaded,) within five working days of receipt from the employer,

regardless of the reporting method. As of June 30, 2007, the New Hire Reporting Center was receiving approximately 57,000 reports per week. If the contractor encounters a backlog, and are unable to meet the five day turnaround requirement, the contractor must alert ODJFS of the problem and describe corrective measures in order to correct the situation.

The contractor must create an electronic transmission of all new records processed at the New Hire Reporting Center. The information will contain new hire reports for employees who are not independent contractors. Vendors will be required to submit new hire information to ODJFS via common delineated text files no later than the next business day. Under the established terms of the contract, the selected contractor would be required to conform to any changes made by ODJFS to the electronic process, and to incur any related costs.

The contractor must enter the following information from the employer reports that are filed as part of the new hire requirement (this information is for NON-independent contractors)

- employee's name
- employee's address
- employee's social security number
- employee's date of hire, re-hire or return to work
- employee's date of birth
- employer's name
- employer's payroll processing address (including state and zip code)
- employer's federal tax identification number (FEIN)

Once a month, the contractor must forward an electronic transmission to ODJFS containing the new hires that are independent contractors. The contractor must assure ODJFS that all electronic transmissions meet industry standards to assure protection of data at all times. New hire information is not public record. Access to any and or all information shall be protected from unauthorized individuals.

For each independent contractor, the vendor must enter the following information from the new hire reports:

- the independent contractor's name
- the independent contractor's address
- the independent contractor's date of birth
- the independent contractor's social security or federal tax identification number FEIN
- the date payments began
- the length of time the independent contractor will be performing services for the employer
- the employer's name
- the employer's address
- the employer's identification number

If the above information is not included in the report, the vendor must obtain the missing information.

**3. Batching and Records Retention:**

The contractor will be responsible for creating a batch numbering process to facilitate record identification, and will key records according to the numbered batches. The contractor will retain all records for twelve months in the same numbered batch sequence (a tape, disc, or list may constitute a “batch”). Hard copy records may be destroyed after 90 calendar days, but the selected vendor must ensure all new hire data is maintained in the database for 365 days. The contractor will be responsible for certifying hard-copy record destruction in accordance with industry standards.

**4. Accessibility and Reporting Method Provisions:**

The selected vendor will be responsible for providing a post office box for mailed data and reports, and for providing sufficient toll-free fax line accessibility so that employers may transmit data easily. (The current contractor has nine fax lines in operation at all times.)

**5. Information & Technical Assistance Services:**

The selected vendor will be responsible for establishing, maintaining, and operating a customer call-center capable of responding to at least 600 telephone calls each month. The calls are primarily from employers, although some may be from local child support agencies or other states. These calls are typically to request information about reporting requirements, where to report, different ways of reporting, etc. The contractor must establish and maintain sufficient toll-free telephone accessibility capable of supporting project call volume. The contractor must also ensure that on-hold time for callers will not exceed five minutes before reaching a call-center operator. In addition to the monthly call volume, the vendor must reply to approximately 180 e-mails per month. The vendor shall be accessible to the employer community during each Ohio state business day, excluding holidays officially recognized by the state or weather emergencies declared by the Ohio State Department of Public Safety.

**6. Website:**

The vendor must operate and maintain an Internet website that provides instructions and guidelines to employers and provides basic information for CSEAs, state agencies, and the general public, regarding the new hire program. The website must include functionality allowing employers to file new hire reports on line. The website must also be capable of accepting employer lists as well as individual reports.

The contractor must operate and maintain a New Hire Reporting website that includes employer instructions for reporting, and must allow employers to report online. All costs associated with the website are the vendor’s responsibility. All website content is subject to the approval of ODJFS. The website may not contain advertisements for any purpose, including promotions of the contractor’s organization.

**7. Public Inquiries:**

Some new hire records will have letters of inquiry attached, often with general questions about new hire requirements and possible reporting mechanisms (new hire data is not public record). The contractor will date stamp all such inquiries and will review and respond within ten days to inquiries of matters under the contractor's purview. Additionally, within that ten-day period, the contractor will forward those documents requiring a response from ODJFS with the envelope in which it was delivered.

**8. Information Protections:**

The selected vendor must establish and implement procedures for the protection of information. New hire data is not public record. The information may not be shared with anyone except child support staff or staff of other programs the department administers. The successful vendor must describe how personal information contained on new hire documents will be safeguarded while on site and when it is destroyed. Vendors must also describe in their proposals steps to be taken to establish and implement protocols for the accessing of protected information by vendor staff (and if appropriate, any vendor sub-contractor and sub-contractor staff); ascertain staff members' awareness of those protocols; and enforce compliance with them. These safeguards must be in place immediately upon contract implementation.

**9. New hire Matching & Follow-up Services:**

The selected New Hire Reporting vendor will also be responsible for conducting a quarterly match process between new hire reports and quarterly wage records from the ODJFS Office of Workforce Development (OWD) to identify those employers which have employees reported to OWD, but which have not reported through the New Hire Reporting Center. The contractor will send a notification to the employers reminding them to report. Ohio law allows for imposing financial sanction for those employers who fail to report newly hired employees. The vendor must send follow-up correspondence on a quarterly basis to employers who appear on the OWD file but have not reported to the New Hire Reporting Center. Under the direction of OCS, the selected vendor may also be responsible for imposing statutory sanctions and fee collection relating to sanctions pursuant to ORC 3121.8910.

Thirty days after the first notification, the vendor will send a follow-up notification to the employer if there has been no response. If no response has been received within 30 days of the second letter, the new hire contractor will report those names to ODJFS. OCS staff will meet with the contractor to determine what approach to take. Under the direction of OCS, the contractor may also be responsible for imposing statutory sanctions pursuant to ORC 3121.8910. Should ODJFS decide to begin fining employers, the agency will create instructions that describe the manner in which payments may be made, and how and when the monies will be transmitted to ODJFS. The task of tracking payments, sending payment notices and monitoring compliance will be the contractor's responsibility.

**10. Reports and Administrative Duties:**

The contractor will be responsible for producing monthly activity reports, compliance reports and an annual report for ODJFS, as outlined below. The contractor will also be required to participate in quality performance monitoring visits with the ODJFS contract manager.

Monthly activity reports are due no later than 20 calendar days following the end of the month when services were performed. The report must be submitted to the ODJFS contract manager via e-mail. The report must include the month of service, and contact information for the preparer in the event there are questions. Following is a list of the information that must be included in the report.

- Number of reports received and processed during the month, with detail indicating the number received electronically and the number received in other formats;
- Number of reports that could not be processed by month's end due to missing information;
- The number of reports that were not processed within five days of receipt;
- Number of phone calls received during the month;
- Number of e-mails received during the month;
- The number of reports that indicated a YES for independent contractor;
- The number of reports that did not indicate a YES for independent contractors.

Upon request from ODJFS, the vendor must complete a quarterly compliance report. The report is due within 20 calendar days of the end of the quarter of service, and must contain the following information:

- the number of first compliance letters sent out;
- the number of second compliance letters sent out;
- the number/name of employers who were sent notification of financial penalties;
- the employers who forwarded the fees, including the amount;
- the employers who challenged the fees;
- the number of employers found liable for the civil penalty of \$ 500.00 (conspiracy penalty);
- the amount of funds forwarded to ODJFS for the reporting quarter.

The New Hire Reporting contractor shall produce an annual report for each state fiscal year of the contract. The report is due by July 31 of each year. The report will be a brief overview of the new hire reports processed for Ohio, and a synopsis of how the reports were received over the twelve month period of the service year. The report shall be e-mailed to the contract manager as identified by ODJFS. At least two hard copies of the annual report must also be forwarded to ODJFS by July 31<sup>st</sup> each year.

**11. Informational Mailings:**

The vendor must be in a position to develop and issue informational mailings at ODJFS' discretion at least twice per year to the state's employers, currently numbering

approximately 300,000. The informational mailing is designed to inform employers about changes in new hire procedures (*i.e.*, vendor change, rule or law changes). If the brochure is announcing a different new hire contractor, the contractor must create, produce and issue the informational mailings no later than fourteen calendar days following formal announcement of the contractor selection. All costs associated with the creation, production, and issuance of the information mailings are the responsibility of the vendor. ODJFS will have final approval on text and style of the document. Mailings will not exceed six double sided pages.

**12. Return of Records:**

Upon the termination of the contract with ODJFS, the contractor will be required to return all electronic and/or hard copy records to ODJFS at the discretion of ODJFS.

**13. Transfer of phone and fax numbers at contract's end:**

If the next RFP results in the New Hire Reporting contract being awarded to a different vendor, the vendor must, to the extent possible facilitate the transfer of phone numbers and fax numbers so the numbers remain the same as the transition occurs to the new vendor.

Additionally, the selected vendor will be required to submit invoices to ODJFS within twenty days of the end of each month of service. The invoice must include the number of documents that were data-entered during the month (including independent contractors). The invoice must be on vendor letterhead and contain a detailed description of services rendered. The service dates must be displayed on the invoice; and **“New Hire Reporting”** must be on the front page of the invoice. The appropriate ODJFS purchase order number must also appear on the invoice. Each invoice must show the number of electronic and non-electronic reports for the billing month.

**3.2 Administrative Structures—Proposed Work Plan**

Vendors are to include, at minimum, the following administrative structures and technical approach for the proposed work plan. The vendor shall:

- A. Provide a technical approach and work plan to be implemented. This includes a proposed timeline for the project;
- B. Provide a status reporting procedure for reporting work completed, and resolution of unanticipated problems;
- C. Provide a current organizational chart (including any subcontractors) and specify the key management and administrative personnel who will be assigned to this project; and
- D. Provide a timeline for each component of the scope of work and the project overall including the staff hours for personnel involved. Include a Table of Organization (including any subcontractors) and a chart showing the number of hours devoted to the project by vendor or sub-contractor staff. The vendor must provide the percentage of time each key management person will devote to the project.

### **3.3 Specifications of Deliverables**

1. The contractor will establish and maintain an office in the central Ohio area that acts as a clearinghouse for all employers to report their new hires, re-hires and independent contractors according to specified time frames. Additionally, the vendor's office must maintain sufficient staff to provide customer services to employers, meaning, at minimum, responding to approximately 600 calls and 180 e-mails per month, creating and operating a vendor website that offers general information on the new hire program and provides employers the ability to report on line.
2. The contractor will receive and process non electronic reports from employers;
3. The contractor will provide data entry services from those reports and data connected with the Ohio New Hire Reporting program;
4. Provide administrative support for the Ohio New Hire Reporting program;

The contract expected to result from this RFP process will have as its deliverables all duties, functions, tasks, and responsibilities established in this RFP, and will include any performance specifications and quality standards established herein. Any additional functions, responsibilities, etc., and any further performance and quality specifications offered in the proposal and accepted by ODJFS for contract award will also become contractual requirements of the vendor.

### **3.4 Selected Vendor Compensation Structure**

ODJFS will pay a flat, all-inclusive fee for each non-electronic report processed and for each electronic report processed (they may or may not be the same fee). All work required under the contract for the New Hire Reporting Center Services will be compensated by this per-unit-of-service price structure; no additional fees, expenses, or costs of any kind may be submitted to ODJFS for payment.

## **SECTION IV. CONDITIONS AND OTHER REQUIREMENTS**

Through this section of the RFP, ODJFS notifies vendors seeking award of a contract of certain conditions and requirements which may affect their eligibility or willingness to participate in any procurement (RFP, RLB, etc.) process; or their eligibility to be awarded a contract; and of requirements that would be in effect should they be awarded a contract.

### **4.1 State Contracts**

Proposals 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 percentage 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 5.2 B., 1** of this RFP.

### **4.2 Interview**

Vendors submitting proposals may be required to participate in an in-depth interview as part of the evaluation process. The interview, if necessary, may include participants from ODJFS and/or other state

or county agency staff or other representatives it may appoint, as appropriate. 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.

#### **4.3 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 project manager when work may begin. **Any work begun by the vendor prior to this notification will NOT be reimbursable by ODJFS.**

#### **4.4 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 4.2, above).

#### **4.5 Trade Secrets Prohibition; Public Information Disclaimer**

**Vendors are prohibited from including any trade secret information** as defined in ORC 1333.61 in their proposals in response to any ODJFS RFP, RLB or other procurement efforts. ODJFS shall consider all proposals voluntarily submitted in response to any ODJFS RFP (or etc.) 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 this RFP shall become the property of ODJFS. This RFP and, after formal announcement by ODJFS of the results of this RFP project (e.g., notices provided to responding vendors regarding vendor selection, notice of project cancellation, etc.), any proposals submitted in response to the RFP are deemed to be public records pursuant to R.C. 149.43. For purposes of this section, "proposal" shall mean both the technical and the cost proposals (if opened by ODJFS) submitted by the vendor, any attachments, addenda, appendices, or sample products.

Any proposals submitted in response to this or any ODJFS RFP which make claims of trade secret information shall be disqualified from consideration immediately upon determination that such unallowable claim has been made.

#### **4.6 Contractual Requirements**

- A. Any contract resulting from the issuance of this RFP is subject to the terms and conditions as provided in the model contract, which is included as **Attachment D.** of this RFP;
- B. Many of the terms and conditions contained in the model contract (See **Attachment D.**) are required by state and federal law; however, the vendor may propose changes to the model contract by annotating the model, and returning it with the vendor's proposal submission. Any changes are subject to ODJFS review and approval;
- C. Payments for any and all services provided pursuant to the contract are contingent upon the availability of state and federal funds;

- D. All aspects of the contract apply equally to work performed by any and all subcontractors;
- E. The contractor, and any subcontractor(s), will not use or disclose any information made available to them for any purpose other than to fulfill the contractual duties specified in the RFP. The contractor, and any subcontractor(s), agrees to be bound by the same standards of confidentiality that apply to the employees of ODJFS and the State of Ohio. Any violation of confidentiality will result in an immediate termination of the contract, and may result in legal action;
- F. As a condition of receiving a contract from ODJFS, the contractor, and any subcontractor(s), shall certify compliance with any court order for the withholding of child support which is issued pursuant to Section 3113.217 of the ORC. The contractor, and any subcontractor(s), must also agree to cooperate with ODJFS and any Ohio Child Support Enforcement Agency in ensuring that the contractor or employees of the contractor meet child support obligations established under state law;
- G. By signing a contract with ODJFS, a vendor agrees that all necessary insurance is in effect; and
- H. The selected contractor shall be required to comply with prevailing wage standards, as established in ORC 4115.03 to 4115.16.

#### **4.7 Travel Reimbursement**

Travel should be folded into the overhead, per diem, or the hourly rates which are built into the cost of the deliverables. Travel is not to be listed separately unless otherwise specified in Section 5.2 C. (Proposal Format and Submission – Cost Proposal) of this RFP.

#### **4.8 Minority Business Enterprise**

ODJFS is required by Section 125.081(B) and 123.151 of the ORC to award fifteen percent (15%) of its total procurements to vendors certified as Minority Business Enterprises (MBE). Ohio certified MBE is defined in ORC Section 122.71. If the proposal is not submitted by a certified MBE, the vendor is strongly encouraged to subcontract a minimum of fifteen percent (15%) of the total contract price to an Ohio certified MBE.

The proposal must clearly indicate the name of the proposed Ohio MBE vendor and the exact nature of the work to be performed under the proposed subcontract. The proposal must include a letter from the proposed MBE, signed by a person authorized to legally bind the subcontractor, indicating the following:

1. The subcontractor's legal status, federal tax ID number, and principle business address;
2. The name, phone number, and fax number of a person who is authorized to legally bind the subcontractor to contractual obligations;
3. A complete description of the work the subcontractor will do;
4. A commitment to do the work, if the vendor is selected;
5. A statement that the subcontractor has and understands the RFP, the nature of the work, and the requirements of the RFP; and
6. A copy of the Ohio MBE certificate.

**There may be no dollar amounts of any kind included with the MBE information; inclusion of dollar amounts will result in the disqualification of the primary vendor's entire proposal.**

A listing of Ohio certified MBEs can be accessed through the Ohio Department of Administrative Services (DAS) Website at: <http://das.ohio.gov/Eod/MBESearch/index.asp>.

While ODJFS strongly encourages the use of MBE subcontractors, the vendor's use of an MBE subcontractor will have no effect on vendors' technical scores or on final contractor selection for this RFP, unless Section VI, Criteria for Proposal Evaluation and Selection of this RFP (and/or the Technical Proposal Score Sheet for this RFP) affirmatively establish an MBE participation criterion.

#### **4.9 Subcontractor Identification and Participation Information**

Any vendors proposing to use a subcontractor for any part of the work described in this RFP must clearly identify the subcontractor(s) and their tasks in their proposals. The proposal must include a letter from the proposed subcontractor(s), signed by a person authorized to legally bind the subcontractor, indicating the following:

1. The subcontractor's legal status, federal tax ID number, and principle business address;
2. The name, phone number, and fax number of a person who is authorized to legally bind the subcontractor to contractual obligations;
3. A complete description of the work the subcontractor will do;
4. A commitment to do the work, if the vendor is selected;
5. A statement that the subcontractor has read and understands the RFP, the nature of the work, and the requirements of the RFP.

**There may be no dollar amounts of any kind included with sub-contractor information; inclusion of dollar amounts will result in the disqualification of the primary vendor's entire proposal.**

#### **4.10 Public Release of Records**

Public release of any evaluation or monitoring reports funded under this agreement 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.

#### **4.11 Confidentiality**

All contracts 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.

#### **4.12 Key Personnel**

ODJFS will require a clause in the resulting contract regarding key personnel in that any person identified as critical to the success of the project may not be removed without reasonable notice to ODJFS, and replacements will not be made without ODJFS approval.

#### **4.13 Ethical & Conflict of Interest Requirements**

- A. No contractor or individual, company or organization seeking a contract 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;
- B. No contractor or individual, company or organization seeking a contract shall solicit any ODJFS employee to violate any of the conduct requirements for employees;
- C. Any contractor acting on behalf of ODJFS shall refrain from activities which could result in violations of ethics and/or 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 refusal by ODJFS to enter into a contract; and
- D. 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.

#### **4.14 Health Insurance Portability & Accessibility Act (HIPAA) Requirements**

As a condition of receiving a contract from 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 CFR 164.501 and any amendments thereto. The selected vendor can reasonably anticipate HIPAA language in the contract that results from this RFP.

In the event of a material breach of contractor obligations under this section, ODJFS may at its option terminate the contract according to provisions within the contract for termination.

#### **4.15 Waiver of Minor Proposal Errors**

ODJFS may, at its sole discretion, waive minor errors or omissions in vendors' Technical and/or Cost proposals/forms when those errors do not unreasonably obscure the meaning of the content.

#### **4.16 Proposal Clarifications**

ODJFS reserves the right to request clarifications from vendors of any information in their Technical and/or Cost proposals/forms, and may request such clarification as it deems necessary at any point in the proposal review process.

#### **4.17 Contractual Requirements and Prevailing Wage 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 RFP. Potential vendors are strongly encouraged to read the model contract and to be fully aware of ODJFS' contractual

requirements. Additionally, the selected contractor will be required to comply with prevailing wage standards, as established in ORC 4115.03-4115.16.

#### **4.18 Unresolved Findings for Recovery (R.C. 9.24)**

ORC 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 arising out of this RFP, without notifying ODJFS of such finding. ODJFS will review the Auditor of State’s website prior to completion of evaluations of proposals submitted pursuant to this RFP. 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.

#### **4.19 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 to be provided for the project which is the subject of this RFP 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 impact that the behavior that led to the claims could have on the vendor’s performance of the work, and the best interests of ODJFS.

#### **4.20 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 RFP. 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.

#### **4.21 Mandatory Disclosures of Work Location**

Proposals must explicitly state the location(s) (city, state/province, country) where work described in this RFP would be performed, whether by the vendor or by any subcontractors.

#### **4.22 Vendor Selection Restriction**

Any vendor deemed not responsible, or submitting a proposal deemed not to be responsive to the terms of this RFP, shall not be awarded the resulting contract.

#### **4.23 Declaration of Material Assistance Requirements**

Any vendor responding to any ODJFS RFP, RLB, or any other procurement opportunity is required to provide certification that the vendor has not provided material support or resources to any organization listed on the "Terrorist Exclusion List" (TEL) maintained by the U.S. Department of State. The Declaration of Material Assistance Form, provided as **Attachment C**, to this RFP, must be printed, completed, and signed by the interested vendor's authorized representative, and returned to ODJFS as a component of the vendor technical proposal/bid. Failure to properly complete the form or to provide it as part of the proposal submitted to ODJFS may result in the disqualification of the vendor's proposal from consideration.

Vendors may access the TEL from the Ohio Homeland Security Office website, located at [www.homelandsecurity.ohio.gov.dma.asp](http://www.homelandsecurity.ohio.gov.dma.asp) or via e-mail to [dma-info@dps.state.oh.us](mailto:dma-info@dps.state.oh.us) for the current list of excluded organizations and additional information.

### **SECTION V. PROPOSAL FORMAT & SUBMISSION**

#### **5.1 Proposal Submission Information**

ODJFS requires proposal submissions in both paper and electronic format. The proposal must be prepared and submitted in accordance with instructions found in this Section. The proposal submission must be comprised of:

- **5** paper copies (**one signed original** and **4** copies) and one CD-ROM copy of the Technical Proposal;

**AND**

- in a sealed, separate envelope, **three** paper copies (**one signed original** and **two** copies) and one CD-ROM copy of the Cost Proposal.

The vendors' total proposal submissions (both the technical and cost proposals in all required copies) must be received by ODJFS complete no later than 3:00 p.m. on **November 27, 2007** Faxes or e-mailed submissions will not be accepted. **Proposals 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**

Vendors' original technical and cost proposals must contain all the information and documents specified in Section 5.2, "Format for Organization of the Proposal." All copies (both paper and CD-ROM) of the proposal must include copies of ALL information, documents, and pages in the original proposal.

Along with the Technical proposal, the vendor must submit the Cost Proposal in a separate, sealed envelope/package labeled: **"NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR NEW HIRE REPORTING SERVICES, RFP#: R-89-09-0740 SUBMITTED BY [VENDOR'S NAME HERE]."**

The CD-ROM copy of the Technical Proposal must include all components of the technical proposal, including any required or voluntary attachments to it. The CD-ROM copy of the Cost Proposal must include all cost proposal components, including any required or voluntary attachments. **The CD-ROM containing the Cost Proposal must be submitted in the sealed envelope containing the hardcopy Cost Proposal.** Both CD-ROMs must be labeled with the vendor's name, the RFP number, and the proposal submission date or proposal due-date, at minimum. The requested CDs will be used by ODJFS for archiving purposes and for fulfillment of Public Records Requests, and failure to include them or to properly label them may, at ODJFS discretion, result in the rejection of the vendor from any consideration.

All proposal submissions must be received, complete, at the above address, via mail or hand delivery by the above date and time. Materials received separately from a vendor's proposal submission (*e.g.*, letters of recommendation from past customers of the vendor's services) will not be added to the proposal nor considered in the review and scoring process. Materials received after the date and time as stated above will not be included in any previous submissions, nor will they be considered. ODJFS is not responsible for proposals incorrectly addressed or for proposals delivered to any ODJFS location other than the address specified above. No confirmation of mailed proposals can be provided.

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 proposals received on the due date by the Office of Contracts & Acquisitions, on the 31<sup>st</sup> Floor of the Rhodes Tower. **ODJFS is not responsible for any proposals delivered to any address other than the address provided above.**

Submission of a proposal indicates acceptance by the vendor of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between ODJFS and the vendor selected.

## **5.2 Format for Organization of the Proposal**

### **A. Overall Proposal Organization**

A sample Technical Proposal Score Sheet is provided as **Attachment E.** of this RFP. **Vendors are strongly encouraged to use the Score Sheet to check their proposals for quality, compliance, and completeness prior to submission.**

The vendor's Technical Proposal must contain the following components (organized in four (4) primary tabs and divided into sub-tabs) as described below. Any other information thought to be relevant, but not applicable to a specific RFP 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 includes information/materials not required in the RFP. All pages beyond Tab 1 shall be sequentially numbered.

Vendors must organize their Technical Proposals in the following order:

**Tab 1** Required Vendor Information and Certifications Document  
Request for Taxpayer Identification Number (W-9) Form  
Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Org.

**Tab 2** Vendor Experience & Qualifications

**Sub-Tab 2a.** Mandatory Vendor Qualifications (Section 2.1, a. and b.)

**Sub-Tab 2b.** Organizational Experience & Capabilities (Section 2.2, a. and b.)

**Sub-Tab 2c.** Staff Experience and Capabilities (Section 2.3, a. and b.)

**Tab 3** Scope of Work and Specifications of Deliverables

**Sub-Tab 3a.** Deliverable 1

**Sub-Tab 3b.** Deliverable 2

**Sub-Tab 3c.** Deliverable 3

**Sub-Tab 3d.** Deliverable 4

**Tab 4** Administrative Structures—Proposed Work Plan

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

**NOTE:** Vendors are required to submit one additional CD-ROM copy (using TWO CD-ROMs) of their entire proposal package in non-rewriteable CD format. One CD-ROM is to contain the complete Technical Proposal, including any required or voluntary attachments to it, and the other CD-ROM is to contain the Cost Proposal including any required or voluntary attachments to it. One document may, at vendor option, be excepted from the electronic technical proposal version: the "Request for Taxpayer Identification Number (W-9) Form" (**provided as RFP Attachment B.**), which is to be signed by the vendor and submitted with the paper copies of the technical proposal. **The CD-ROM containing the Cost Form must be submitted in the sealed envelope containing the hardcopy Cost Form.**

## **B. Technical Proposal Details**

The vendor's Technical Proposal must contain the following components, at minimum. It is mandatory that vendor proposals be organized in the following order, and that wherever appropriate, sections/portions of the vendor proposal make reference by section number/letter to those RFP requirements to which they correspond.

**IMPORTANT:** Any vendor Technical Proposals found to contain any prohibited cost information shall be disqualified from consideration. Prohibited cost information is defined as any dollar amounts which ODJFS might find indicative of the relative cost or economy of the proposed project. However, 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 technical proposal. Any prohibited cost information must be submitted with the separate, sealed project budget/Cost Proposal. The Technical 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 project budget/Cost Proposal. Should a vendor feel it is important to include any documents containing such prohibited cost information in the technical proposal, the cost information in those documents must be made unreadable by the vendor before submission of the proposal to ODJFS.

**1. (Tab 1)**  
**Required Vendor Information & Certifications**  
**Request for Taxpayer Identification Number (W-9) Form**  
**Declaration Regarding Material Assistance / Non-Assistance to a Terrorist Organization**

In this section, the vendor is to provide required information and certifications of eligibility for state contract awards, as described in **Attachment A.** to this RFP, entitled "Required Vendor Information & Certifications Document." Vendors may, at their discretion, either print **Attachment A.**, complete and sign it (in blue ink), and return it as the content of their Proposal Tab 1; or they may provide all the required information and certifications (each fully re-stated from **Attachment A.**) on their own letterhead, properly signed (in blue ink), and use that document as the content of their Proposal Tab 1. Vendors who fail to provide all information and certifications as described in **Attachment A.** in their Proposal Tab 1 risk disqualification.

The vendor must attach the **Request for Taxpayer Identification Number (W-9) Form**, which is provided as **Attachment B.** to this RFP, completed with an original signature in blue ink.

Vendors are required to provide a declaration regarding material assistance to a terrorist organization or an organization that supports terrorism as identified by the U.S. Department of State Terrorist Exclusion List and described in **Attachment C, Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Organization.** Vendors MUST print **Attachment C.**, complete and sign it (in blue ink), and return it as the content of their Proposal Tab 1. 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>.

The signed originals of the above referenced forms (**RFP Attachments A., B., and C.**) are to be provided in the vendor's original proposal; photocopies of the completed and signed forms must also be provided with each of the required copies.

In the event that the vendor proposes the use of any subcontractors, information on the subcontractor(s) and letters of commitment as required by Section 4.8, Minority Business Enterprise or 4.9, Subcontractor Identification and Participation Information should also be provided in Tab 1.

In order to be acknowledged as a vendor with an Ohio presence (as described in RFP Section 4.24, Ohio Presence Consideration) for additional scoring consideration, the vendor must demonstrate in this Tab1 section of its proposal either that it currently has a physical presence in Ohio or has concrete plans for establishing a physical presence. Information to be presented includes the actual or proposed location of the vendor's presence, a description of the work to be performed at that location, and the number of its personnel to operate from the Ohio location. If the Ohio location is planned but not yet operational, an estimated implementation schedule should be provided.

**2. (Tab 2)  
Vendor Experience & Qualifications**

**a. Mandatory Vendor Qualifications (Sub-Tab 2 a.)**

The vendor must include information on the mandatory experience of the vendor, as described in **Section 2.1**, of this RFP.

**b. Organizational Experience and Capabilities (Sub-Tab 2 b.)**

The vendor should include information on the relevant experience of the vendor including any subcontractors; and any prior experience relevant to this RFP, as described in **Section 2.2**, of this RFP.

**c. Staff Experience and Capabilities (Sub-Tab 2 c.)**

Under this section the vendor is required to include resumes, education, experience, and list of related published works of all key personnel for this project, and describe any appropriate supplemental and support staff (including any subcontractors) to be involved, as described in **Section 2.3**, of this RFP.

**3. (Tab 3)  
Scope of Work & Specifications of Deliverables**

This section should describe in detail how the vendor proposes to perform each tasks of the scope of work identified in Sections 3.1, Scope of Work and in Section 3.3, Specifications of Deliverables, of this RFP. The responses must address each element separately. Vendors should place their responses for each Deliverable identified in Section 3.3 behind separate sub-tabs as described above.

**4. (Tab 4)  
Administrative Structures—Proposed Work Plan**

This section should describe in detail (in the order as outlined) the vendor’s administrative structures as specified in Section 3.2, Administrative Structures—Proposed Work Plan of this RFP.

**C. Cost Proposal**

**Three** copies (one signed original and two copies) of the Cost Proposal must be submitted in a separate, sealed envelope, and labeled: **“NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR NEW HIRE REPORTING SERVICES, RFP#: R-89-09-0740 SUBMITTED BY [VENDOR’S NAME HERE].”**

This envelope/package must also contain the labeled Cost Proposal CD-ROM. The Proposal must include a statement that the prices quoted are firm. The Vendor Cost Proposal Form must contain the following information:

- 1. Per-Item Charge, inclusive of entire New-Hire Reporting Center operations:**  
The contract All-Inclusive Costs, for electronic reports processing (**A.**, below) and for non-electronic reports processing (**B.**, below), together constitute the vendor’s bid price. These costs together must represent the vendor’s total costs for performance of the entire scope of work, and for provision of all deliverables as delineated in Section III of the RFP, including any associated costs.

Vendors must submit two costs:

- A. All-Inclusive Cost of processing **electronic** new hire reports** from employers (vendors are to calculate this per-item cost based on 2,000,000 electronic new hire reports per year); and
- B. All-Inclusive Cost of processing **non-electronic** new hire reports** from employers (vendors are to calculate this per-item cost based on 1,000,000 non-electronic new hire reports per year).

Both **Cost A** and **Cost B** must be displayed as the individual per-item cost. In addition, the Cost A per-item cost must be multiplied by the 2,000,000 reports per year, and the Cost B per-item cost must be multiplied by the 1,000,000 reports per year, as follows:

- 2. Total Cost per year:** The total annual cost will be Cost A and Cost B, multiplied by their respective report volume, combined.

$$\begin{array}{r}
 \text{Cost A multiplied by 2,000,000} = \$ \underline{\hspace{2cm}} \\
 + \text{Cost B multiplied by 1,000,000} = \$ \underline{\hspace{2cm}} \\
 \text{Total Per-year, all-inclusive contract amount} = \$ \underline{\hspace{2cm}}
 \end{array}$$

Vendors are to use the format in **Attachment F, Cost Proposal Form**, to submit their cost proposal for SFYs 08, 09 and potential SFY renewals for 10 and 11. At the vendor’s

discretion, additional documentation may also be included with the completed **Attachment F.**, as explanatory information, but when making the vendor selections and when executing the contract, ODJFS will consider only the dollar amounts displayed on the Cost Proposal Form.

In calculating their total proposed cost, vendors must consider cost resulting from each deliverable listed in Section 3.3 of this RFP, as well as all program costs, primary and incidental, necessary to complete all program activities (whether explicitly identified by ODJFS in this RFP or not).

**D. IMPORTANT – VENDOR DISQUALIFIERS FOR PROPOSAL ERRORS:**

- Any vendor's Technical 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 technical proposal as information on business capacity and stability. All prohibited cost information must be submitted with the separate, sealed Cost Proposal. The Technical 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 technical 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 4.5 of this RFP) found anywhere in a vendor's proposal shall result in immediate disqualification of that vendor's proposal.

**SECTION VI. CRITERIA FOR PROPOSAL EVALUATION & SELECTION**

**6.1 Scoring of Proposals**

ODJFS will contract with a vendor that best demonstrates the ability to meet requirements as specified in this RFP. Vendors submitting a response will be evaluated based on the capacity and experience demonstrated in their Technical and Cost Proposal. All proposals will be reviewed and scored by a Proposal Review Team (PRT), comprised of staff from ODJFS, Office of Child Support and their designees. 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 use of self-promotional claims will be evaluated accordingly. PRT members will be 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.

Selection of the vendor will be based upon the criteria specified in Sections II., III., IV., and V. of this RFP. Any proposals not meeting the requirements contained in those sections of this RFP will not be

scored or may be held pending receipt of required clarifications. The PRT reserves the right to reject any and all proposals, in whole or in part, received in response to this request. The review team 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:

**A. Phase I. Review—Initial Qualifying Criteria:**

In order to be fully reviewed and scored, proposals submitted must pass the following Phase I. Review. **Any “no” for the listed Phase I. criteria will eliminate a proposal from further consideration.**

1. Was the proposal received by the deadline as specified in Sections 1.6 and 5.1?
2. Did the vendor submit five (5) paper copies and one electronic copy of their Technical Proposal, as well as their Cost Proposal (in a separate sealed envelope labeled: **“NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR NEW HIRE REPORTING SERVICES FOR RFP#: R-89-09-0740 SUBMITTED BY [VENDOR’S NAME HERE].”**)?
3. Does the vendor’s proposal include all required affirmative statements and certifications, signed by the vendor’s responsible representative, as described in **Attachments B., and C.** to the RFP?
4. According to those certifications, does the vendor affirmatively indicate that it is not on the federal debarment list; that there are no unfair labor findings against it; and it is not in violation of ORC Section 9.24, and therefore may enter into a contract with ODJFS?
5. Does ODJFS’ review of the Auditor of State website verify that the vendor is not excluded from contracting with ODJFS by ORC Section 9.24 for an unresolved finding for recovery (*i.e.*, the proposal of any vendor whose name appears on the Auditor’s website as having an unresolved finding for recovery will be eliminated from further consideration.)?
6. Vendor’s proposal includes a minimum of five years experience in data entry projects that require the processing of at least two million reports each year.
7. Vendor’s proposal includes at least three years experience in managing a call center responsible for answering at least 600 calls per month and responding to 180 e-mails per month.
8. Vendor’s proposal includes experience in maintaining a call center that responds to approximately 600 calls and 180 e-mails per month.
9. Vendor’s proposal Identifies, by position and by name, any additional staff they might consider key to the project’s success; and includes resumes for those persons. Key staff must have at least a four year degree in a related field.

**B. Phase II. Review—Criteria for Scoring the Technical Proposal:**

The PRT will then score those qualifying technical proposals, not eliminated in Phase I. Review, by assessing how well the vendor meets the requirements as specified in

Sections II, III, IV, V, and VI. of this RFP. Using the score sheet for Phase II scoring (see **Attachment E.** of this RFP for specific evaluation criteria), the PRT will read, review, discuss and reach consensus on the final technical score for each qualifying technical proposal.

A maximum of **xxx** points will be awarded for the Technical Proposal. A technical proposal must achieve a total of at least **xxx** points (a score which represents that the vendor can successfully perform the resulting contractual duties) out of the possible **xxx**

points to qualify for continued consideration. Any proposal which does not meet the minimum required technical proposal points will be disqualified from any further consideration and its cost proposal will neither be opened nor considered.

All Phase II technical proposal evaluation criteria will be scored according to the following scale, based on a proposed plan’s ability to meet ODJFS needs. The Technical Proposal Score Sheet (see **Attachment E.**) uses the following point values for rating each requirement.

0	6	8	10
Does Not Meet Requirement	Partially Meets	Meets Requirement	Exceeds Requirement

**Technical Performance Scoring Definitions:**

**“Does Not Meet Requirement”**- A particular RFP requirement was not addressed in the vendor’s proposal, **Score: 0**

**“Partially Meets Requirement”**-Vendor proposal demonstrates some attempt at meeting a particular RFP requirement, but that attempt falls below acceptable level, **Score: 6**

**“Meets Requirement”**-Vendor proposal fulfills a particular RFP requirement in all material respects, potentially with only minor, non-substantial deviation, **Score: 8**

**“Exceeds Requirement”**-Vendor proposal fulfills a particular RFP requirement in all material respects, and offers some additional level of quality in excess of ODJFS expectations, **Score: 10**

**IMPORTANT:** Before submitting a proposal to ODJFS in response to this RFP, vendors are strongly encouraged to use the Technical Proposal Score Sheet (**Attachment E.**) and the above technical performance scoring information to review their proposals for completeness, compliance and quality.

All the remaining qualified Technical Proposals will proceed to the next level of review, which is consideration of the Cost Proposal. Any other proposals will be disqualified

from further consideration, and the corresponding Cost Proposals will neither be opened nor will be scored.

**C. Phase III.—Criteria for Considering the Cost Proposal**

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 Technical Proposal score. This compares the cost with the quality of the Technical Proposal, which will provide an average cost-per-quality point earned on the Technical Proposal.

If the cost proposals of all technically qualifying vendors (as determined by the scoring process described in this section and by the Technical Proposal Score Sheet, **Attachment E.** to this RFP) are in excess of the available funding for this project, ODJFS may, at its sole discretion, negotiate with all technically qualifying vendors for a revised cost proposal. Vendors may then submit one last and best offer, or may request that ODJFS view its original cost proposal as its last and best offer, or may formally withdraw from further consideration, and shall formally indicate its choice according to directions provided by ODJFS at that time. Upon receipt of all last and best offers, and assuming that one or more have submitted a cost proposal that is within project budget, ODJFS will then consider those vendors' revised cost proposals which are within the budget according to the cost-point assignment process described in this section, above, and in the Technical Proposal Score Sheet, **Attachment E.**, for calculation of the winning score.

**6.2 Review Process Caveats**

ODJFS may, at its sole discretion, waive minor errors or omissions in vendors' Technical and/or Cost proposals/forms when those errors do not unreasonably obscure the meaning of the content.

ODJFS reserves the right to request clarifications from vendors to any information in their Technical and/or Cost proposals/forms, and may request such clarification as it deems necessary at any point in the proposal review process. Any such requests for proposal clarification when initiated by ODJFS, and vendors' verbal or written response to those requests, shall not be considered a violation of the communication prohibitions contained in Section 1.9 of this RFP. Such communications are expressly permitted when initiated by ODJFS, but are at the sole discretion of ODJFS.

Should ODJFS determine a need for interviewing vendors prior to making a final selection, results to interview questions shall be scored in a manner similar to the process described in Section 6.1, Scoring of Proposals, above. Such scored results may be either added to those vendors' proposal scores, or will replace certain criteria scores, at the discretion of ODJFS. The standards for scoring the interviews and the method used for considering the results of the interviews shall be applied consistently for all vendors participating in the interview process for that RFP.

ODJFS reserves the right to negotiate with vendors for adjustments to their proposals should ODJFS determine, for any reason, to adjust the scope of the project for which this RFP is released. Such communications are not violations of any communications prohibition, and are expressly permitted when initiated by ODJFS, but are at the sole discretion of ODJFS.

Any vendor deemed not responsible, or any submitting a proposal deemed not to be responsive to the terms of this RFP, shall not be awarded the contract.

### **6.3 Final Vendor Recommendation**

The PRT will recommend to the Director of ODJFS the technically qualified vendor offering the proposal most advantageous to ODJFS, as determined by the processes and requirements established in this RFP.

### **6.4 Tie Breaker**

In the event that two or more of the proposals have a score which is tied after final calculation of both the technical proposal and the cost proposal, the proposal with the higher score in the technical proposal will prevail.

## **SECTION VII. PROTEST PROCEDURE**

### **7.1 Protests**

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

- A. A protest may be filed by a prospective or actual bidder objecting to the award of a contract resulting from this RFP. The protest shall be in writing and shall contain the following information:
  1. The name, address, and telephone number of the protestor;
  2. The name and number of the RFP being protested;
  3. A detailed statement of the legal and factual grounds for the protest, including copies of any relevant documents;
  4. A request for a ruling by ODJFS;
  5. A statement as to the form of relief requested from ODJFS; and
  6. Any other information the protestor believes to be essential to the determination of the factual and legal questions at issue in the written protest.
  
- B. A timely protest shall be considered by ODJFS, if it is received by ODJFS' Office of Legal Services, within the following periods:
  1. A protest based on alleged improprieties in the issuance of the RFP 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. the closing date for receipt of proposals, as specified in Section 1.6, Anticipated Procurement Time Table, of this RFP.
  2. 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 eighth (8th) calendar day after the issuance of the Letter of Intent to Award the contract.

- C. 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 B. of this section.
- D. All protests must be filed at the following location:
- Chief Legal Counsel  
ODJFS Office of Legal Services  
30 East Broad Street, 31st Floor  
Columbus, Ohio 43215-0423
- E. 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.
- F. 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.

## 7.2 Caveats

**ODJFS is under no obligation to issue a contract 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. Changes in this RFP of a material nature will be provided via the agency website. All vendors are responsible for obtaining any such changes without further notice by ODJFS.**

## SECTION VIII. ATTACHMENTS AND THEIR USES

- A. **Required Vendor Information and Certifications** (*To be completed & included in proposal packet as specified in Sec. 5.2, B., 1.*)
- B. **Request for Taxpayer Identification Number (W-9) Form** (*To be completed & included in proposal packet as specified in Sec. 5.2, B., 1.*)
- C. **Declaration of Material Assistance Form** (*To be completed & included in proposal packet as specified in Sec. 5.2, B., 1.*)
- D. **ODJFS Model Contract** (*For vendor reference purposes*)
- E. **Technical Proposal Score Sheet** (*For vendor self-evaluation purposes...do not submit*)
- F. **Cost Proposal Form** (*To be completed & included in cost proposal packet as specified in Sec. 5.2, C.*)

Thank you for your interest in this project.