

REQUEST FOR PROPOSALS

R-89-15-0877

Ohio Skills Bank Regional Research and Analysis/ Solutions Development Phase

Released November 19, 2007

Proposals due December 17, 2007

**OHIO SKILLS BANK – REGIONAL RESEARCH AND ANALYSIS/SOLUTIONS
DEVELOPMENT PHASE
REQUEST FOR PROPOSALS**

RFP#: R-89-15-0877

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**ODJFS REQUEST FOR PROPOSALS (RFP):
Ohio Skills Bank – Regional Research and Analysis/Solutions Development Phase**

RFP#: R-89-15-0877

SECTION I. GENERAL PURPOSE & APPLICANT INFORMATION

1.1 Purpose

The future of jobs growth in Ohio is in investing in our regional strengths and in making sure we have the most educated, highly skilled workforce possible.

— Governor Ted Strickland, June 4, 2007

The Ohio Department of Job and Family Services (ODJFS) releases this Request for Proposals (RFP) for the purpose of implementing the Ohio Skills Bank initiative’s regional Research and Analysis/Solutions Development Phase.

The Ohio Skills Bank (OSB), a key component of Governor Strickland’s Turnaround Ohio plan, will invest in regional strategies that align workforce and economic development activities. The OSB supports regional efforts to analyze critical occupation and skill shortages in key industries within regional labor markets. Once the shortages are understood, solutions will be devised to address them, primarily through workforce education, training and industry-recognized, portable credentialing systems.

In this first phase of the OSB, the state will provide funding for regional research and planning geared toward determining demand-driven occupations and skill gaps. Regions will design workforce-driven solutions that systemically address Ohio’s critical economic challenges. Under this initiative, the state will award one grant for each of the twelve Economic Development Regions (EDRs) as defined by the Ohio Department of Development. (A map of the EDRs can be found in Section 9.2.)

This RFP is not a comprehensive program description document, nor should it be taken as such. It is a document geared toward soliciting proposals for regional fiscal agent and planning services. For a more comprehensive overview of the Ohio Skills Bank, please refer to Section 9.1.

1.2 Eligible Applicants

ODJFS seeks applications from legally designated Workforce Investment Areas, endorsed by their respective Administrative Entities and Fiscal Agents. Fiscal agents and planning staff will support policy objectives outlined by their Regional Leadership Teams (RLTs). In addition to assuming fiduciary responsibilities, selected grantees will be responsible for successful completion of the regional planning process. In order to complete the planning functions, the Workforce Investment Boards (WIBs) may involve Subject Matter Experts (SMEs). Each WIB choosing to respond to this RFP must offer a plan for providing the services described in this RFP.

Each EDR may contain multiple WIBs and a WIB may represent counties in multiple EDRs. WIBs whose WIA boundaries overlap EDRs, in whole or in part, may submit proposals for each overlapping EDR. However, each WIB proposal must offer a plan in response to this RFP for an entire EDR. Each proposal must specify the EDR for which the plan is offered.

For example, if WIB (X) has WIA boundaries that overlap EDR (A) and EDR (B), then WIB (X) may submit two proposals, one for EDR (A) and one for EDR (B). Each proposal submitted will be rated separately against competing proposals submitted by other WIBs for EDR (A) and (B).

1.3 Issuing Office

This RFP is released by ODJFS, and the subsequent Notice of Awards will be issued by ODJFS, Office of Workforce Development, which will also administer the funded projects. As the state administrator of WIA funds, ODJFS will be responsible for state level supervision and oversight of all grantees' OSB activities.

Applicant proposals must be submitted to ODJFS in strict accordance with proposal submission instructions provided in **Section 5.1, Proposal Submission Information**. If interested applicants 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, Communication Prohibitions**, of this RFP. Applicants 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 5.1 of this RFP.

1.4 Background

A new concept for the state of Ohio, the OSB is modeled after industry sector strategies that have been implemented in a number of states across the nation. This programming represents current best practices in the leveraging of public workforce and training funds toward the alignment of state workforce and economic development systems as described by National Governors' Association Center for Best Practices, 2006. These strategies are regional, industry-specific approaches to workforce concerns that build partnerships of employers, education and training providers, organized labor, economic development organizations, and supportive service providers to address both the workforce needs of employers and the training, employment, and career advancement needs of workers.

Industry sector strategies differ from traditional state education, workforce, and economic development systems in a number of ways (Figure 1). Most notably, rather than funding individual training projects for specific employers, sector strategies empower regions to use data and research to identify and address the workforce needs of multiple employers within an industry. Programming is managed by regional partnerships that bring employers in the same industry together to undertake an in-depth analysis of their workforce needs.

The goal of an industry sector strategy is to promote long-term improvement in local economic development and workforce systems to produce the skilled workers needed for targeted industries. These strategies are intended to benefit state and regional economies, employers, and workers.

Figure 1. Key Elements of Regional Sector Strategy Programming

1. Multi-employer	Employers within an industry work together to design solutions to common workforce skill needs.
2. Creating a bridge	Bringing industry, labor, workforce development, education and training, economic development and community based organizations together to devise solutions to problems that no individual group has been able to solve on their own
3. A process with a clear “line of sight”	Proposed solutions must fix the identified solutions at the root cause level.
4. Knowledge-driven	Local partners work together to synthesize economic and labor market data and “first person intelligence” from key stakeholders.
5. Drilling down	Identified problems are fully investigated, and solutions to the problems are highly specific.
6. Dual customers	Solutions benefit employers and low-skilled workers.
7. Multiple solutions	Solutions to addressing workforce gaps leverage a variety of state and local resources.
8. System change	Innovative programming systemically fixes workforce shortages at the root cause level and acts as a model for future planning/programming activity.

Beyond the confines of this project, the State of Ohio has an interest in determining the strategic direction of its EDRs. Meaningful regional interrelationships between economic development and workforce development are critical. The Ohio Skills Bank planning process will be a means for state and regional policymakers to better understand the dynamics within individual regions.

For more information on the Ohio Skills Bank, refer to Section 9.1.

1.5 Overview of the Project

The Ohio Skills Bank is a defined-period project that will develop innovative, sector strategy-driven workforce programming while also building regional planning capacity.

The OSB will be conducted in two phases: (1) Research and Analysis/Solutions Development Phase (research, analysis and program design) - January through September 2008 and (2) Solutions Initiatives Phase (service delivery) – November 2008-2011.

Funding awarded as a result of this RFP is limited to the Regional Research and Analysis/Solutions Development Phase of the OSB. The Research and Analysis/Solutions Development Phase involves three components, which are:

1. Occupation and Skill Shortage identification
2. Root Cause Determination

3. Solution Development, including grant requests for the Solutions Initiatives Phase

Each component will be conducted at the regional level by regional planning staff under the direction of the RLT. OSB regions are aligned with the Ohio Department of Development's Regional Economic Development map which can be found in Section 9.2.

The OSB's data-driven research approach will enable regions to better identify skill shortages and their root causes as well as develop solutions which best address each region's unique set of challenges. Regional solutions that are generated through the OSB will enable RLTs to better orchestrate workforce development, economic development, and education's efforts toward specific, strategic outcomes.

The OSB is not intended to supplant the role of Ohio's current network of Workforce Investment Boards and One-Stops. Its work will result in regional-specific education and training options that will enhance the ability of Ohio's Workforce Investment Boards to meet the needs of clients within their regions.

1.6 Project Process and Outcomes

The OSB Research and Analysis/Solutions Development Phase Project has three primary tasks which will result in deliverable planning reports. Grants awarded through this RFP will fund the successful completion of these three tasks by the regions. Successful completion and delivery to ODJFS of all reports generated in this section will be the responsibility of regional planning staff under supervision of their respective fiscal agents.

For the purposes of accomplishing these tasks, fiscal agents, planning staff and RLTs may be interchangeably referred to as "Regions".

1.6. (A) Occupation and Skill Shortages - Expectations

The first report, due **March 31, 2008**, will contain research-based findings that identify the occupational and skill shortages of high-growth, high-wage industries within their region. The process for creating this report is:

Step 1: Identify industries or clusters of industries within the EDR that are critical to the regional economy. Solid research and analysis will lay the foundation for this identification. Regions must make use of secondary sources (i.e. prior research and state and local sources of economic and labor market data) and primary sources (i.e. survey research, business summits, industry focus groups, job vacancy surveys). Methodological consistency among EDRs is important in this step. Therefore, ODJFS will furnish:

- A comprehensive research guide.
- Online resources for secondary data.
- Expert training and technical assistance.

Step 2: Once important industries and clusters of industries are identified, it will be necessary to "drill down" to find the key industries and employers that are experiencing, or are projected to experience, shortages in critical occupations and skills. Specificity in this area is important so that, ultimately, identification of individual employer partners within the targeted industries is possible.

Step 3: Specific occupations and skill sets in shortage will be identified and targeted for further study. For an occupation to be deemed “in shortage,” it must meet these criteria:

- Must show evidence of strong employment demand from employers, such as above average, projected rates of employment growth and significant numbers of projected, total annual job openings compared to related training and licensing data (if available), and/or high reported demand from rigorous, well constructed and representative local employer job vacancy surveys;
- Must provide indications of upward pressure on occupational wages, such as percentage occupational wage increases rising faster than the rate of increase of the Consumer Price Index (CPI);
- State and national transactions data from the Ohio SCOTI (Shared Career Opportunities and Training Information) Job Bank and America's Job Bank (AJB) must indicate hard-to-fill job order statistics or imbalances in occupational labor markets based on keyword analysis of job orders and resumes, and/or analysts of the U.S. Bureau of Labor Statistics (BLS) have concluded that job openings exceed job seekers leading to excellent job opportunities in an occupational labor market;
- Must be a critical labor input into the production function of an employer and/or industry, as reflected in industry staffing patterns; and
- Must be appropriate for targeting by the public workforce system.

Promising or emerging shortages that do not meet these criteria should be catalogued for future regional study and/or action.

Step 4: The analysis must move from identification to quantification. Specific numeric estimates of projected occupational shortages must be made for the near term and long term. With respect to shortages of critical skill sets (“skill gaps”), it will be necessary to describe their negative impacts on the development of key industries and clusters of industries. Regional industry representatives will participate in the analyses and validate that the occupations and/or skill sets selected for further study are, in fact, critical to industry needs and are in shortage or are likely to become so. Industry representatives must also indicate that they welcome partnership-based collaboration with the public sector to meet the demand for skilled workers.

The identification of critical occupations and skill sets as well as the quantification of their shortages are expected to be joint efforts by the region and the targeted industry or clusters of industries.

1.6. (B) Root Cause - Expectations

The second report, due **May 30, 2008**, will offer regionally-specific conclusions that explain the root causes of the identified shortages. Shortages may be traced to supply or demand side causes; therefore a comprehensive analysis, utilizing both primary and secondary resources, is necessary. Regions must fully describe each root cause; show its relative importance in addressing skill shortages, and present evidence as to how the root cause was identified. Regions will base their research on data from public sources (secondary data), and collect primary data from industry associations, universities, and individual employers to help identify factors that contribute to the shortages. Regions will host events such as business summits and/or undertake surveys to explore the root causes of the shortages with industry representatives. Finally, data may be collected directly from incumbent workers in the

occupation, those who have recently left the occupation, and/or the emerging workforce.

Industry partners must verify that the root cause analyses were undertaken jointly with the industry and that the industry partners validate the findings.

1.6. (C) Develop Solutions - Expectations

The third report, due **September 30, 2008**, will offer solutions to the identified shortages that are tied directly to the root causes. Regions must be able to demonstrate convincingly that the proposed solutions are not merely temporary fixes, but meaningful efforts to attack the root cause. Rationale and evidence must be provided to show that each solution is feasible and has the potential to address the short and long-term shortages.

This report will also serve the dual purpose of acting as the regional grant application for the forthcoming OSB Solutions Initiatives Phase.

Industry partners must verify that the development of the solutions was undertaken jointly with the industry and that the industry partners agree with the findings, and that the solutions clearly outline a long-term, sustainable funding plan.

1.6. (D) Grantees' Role

Grant recipients or their designees will be responsible for supporting the RLTs' strategic directives and ensuring that the reports listed in this section are delivered in a timely manner. As direct staff support, grantees or their designees will perform the day-to-day operations associated with the successful completion of the three primary tasks. Lastly, the grantee (with no designee assistance) will administer the fiscal functions of the planning process.

1.6. (E) ODJFS Role

ODJFS will offer capacity-building training and technical assistance throughout the process to assist regions toward the successful completion of the OSB Research and Analysis/Solutions Development Phase.

ODJFS will coordinate the state review of all submitted OSB regional planning reports act as day-to-day state liaison with regional grantees and issue the forthcoming OSB implementation grant RFP.

Looking beyond the specific tasks assigned for the OSB, ODJFS intends to use the intelligence gathered from the regional OSB reports as important tools in aligning state and regional strategies with its external funding sources. The department facilitates grant applications for a number of U.S. Department of Labor initiatives. These initiatives include but are not limited to WIRED (Workforce Innovation in Regional Economic Development), the High-Growth Job Training Initiative and Community-Based Job Training grants. ODJFS also can access other funding sources, such as philanthropic foundations.

1.6. (F) Grant Award Structure

ODJFS will issue \$3,000,000 statewide to fund the Research and Analysis/Solutions Development Phase of the Ohio Skills Bank initiative. ODJFS plans to issue twelve separate awards in the amount of \$250,000, one for each of the twelve Economic Development Regions. As a result of this RFP, ODJFS will issue awards to selected WIBs through their existing WIA Subgrant Agreements. WIB fiscal agents will serve as the fiscal agent for the Ohio Skills Bank initiative.

The primary audit responsibility will remain with the fiscal agent for all fiscal related functions, including financial reporting, budget tracking, and fiscal audits.

WIB grantees will have the primary responsibility for financial reporting. Grantees will be required to perform financial reporting responsibilities in accordance with the Workforce Investment Act Subgrant Agreements and submit OSB Research and Analysis/Solutions Development Phase reports to OWD according to the timeline outlined in section 1.5.

Grantees will also be responsible for the timely delivery of OSB Research and Analysis/Solutions Development Phase Reports.

1.7 Anticipated Procurement Timetable

DATE	EVENT/ACTIVITY
November 19, 2007	ODJFS releases RFP to potential applicants on ODJFS web site and announces posting of RFP on Workforce 411 email list; Q&A Period Opens - RFP becomes active - Applicants may submit inquiries for RFP clarification
December 3, 2007	Applicant Q&A period closes, 10 a.m. (for inquiries for RFP clarification) - No further inquiries for RFP clarification will be accepted
December 7, 2007	ODJFS provides final applicant question & answer document (estimated date)
December 17, 2007	Deadline for Applicants to Submit Proposals to ODJFS (3 p.m.) - This is the proposal opening date, beginning the ODJFS process of proposal review
January 4-18, 2008	ODJFS issues Notice of Award letters - Applicants that submitted proposals in response to this RFP will be sent letters stating whether their proposal was accepted for award.

January 21, 2008	OSB Research and Analysis/Solutions Development Phase begins (estimated–following notification of all contractual and funding approvals)
October 15, 2008	Project Completion - All Research and Analysis/Solutions Development Phase work is completed and Solutions Initiatives Phase grant requests will be reviewed by ODJFS and state agency partners

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. An effort will be made to provide a reasonable public notice before changing the schedule.

The selected WIBs may neither perform work nor submit a cash draw for work performed for this project for any time period prior to the award letter. The ODJFS Contract Manager will notify the selected applicant when the requirements of ORC Section 126.07 have been met.

1.8 Internet Question & Answer Period; RFP Clarification Opportunity

Potential applicants may ask clarifying questions regarding this RFP via the Internet during the Q&A Period as outlined in Section 1.7, Anticipated Procurement Timetable. To ask a question, potential applicants 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 *R89150877*;**
- **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 applicant must also include the name of a representative of the potential applicant, 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 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 applicants. Potential applicants 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 applicants asking questions, as well as the final version (in which all applicants that posed questions will be identified). ODJFS strongly encourages applicants 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 applicants' follow-up questions.

Applicant 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 applicants 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 applicants for copies of previous RFPs, past applicant 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 1.10, Communication Prohibitions, will be honored. The posted time frames for ODJFS responses to Internet questions for RFP clarification do not apply to PRRs.

Applicants 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 applicants who choose to respond to the RFP. If applicants 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 applicants should also refer to RFP Section 1.10, Time Frames and Funding Source, for related information.

There is an established time period for the Applicant Q&A process (see Section 1.7, Anticipated Procurement Timetable, above). ODJFS will only answer those questions submitted within the stated time frame for submission of applicant 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 applicants 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.

1.9 Grantees' Library

- "Turn Around Ohio" policy document
http://www.ohioworkforce.org/docs/Attach_C_TurnaroundOhio-JFS.pdf
- Setting Ohio's Talent Agenda Transition policy document
http://www.ohioworkforce.org/docs/Attach_D_Talent_Agenda.pdf
- State of Ohio Workforce Investment Act and Wagner-Peyser Plan
http://www.ohioworkforce.org/docs/2007_Mod_State_Plan.pdf
- Ohio Skills Bank Initiative design document (Section 9.1 of this document)
- "Working Together: Aligning State Systems and Policies for Individual and Regional Prosperity" (Workforce Strategy Center, 2006)

- Available at <http://www.workforcestrategy.org/publications/bysection/all>
- “State Sector Strategies: Regional Solutions to Worker and Employer Needs” (NGA Center for Best Practices, 2006)
Available at <http://www.nga.org> (Direct link: <http://tinyurl.com/3ydzzs>)
- “Tough Choices or Tough Times: The Report of the New Commission on the Skills of the American Workforce” (National Center on Education and the Economy, 2007)
Executive Summary available at <http://www.skillscommission.org/executive.htm>

Because the OSB is a philosophical descendant of the State of Illinois’ Critical Skills Shortage Initiative (http://www.commerce.state.il.us/dceo/Bureaus/Workforce_Development/Resources/CSSI.htm) and the State of Indiana’s Strategic Skills Initiative (<http://www.in.gov/dwd/3175.htm>), grant applicants are encouraged to explore the work accomplished by those programs as well.

A wide variety of information on ODJFS and its programs which interested applicants may find useful is available to the public via the ODJFS website at <http://jfs.ohio.gov>.

1.10 Communication Prohibitions

From the issuance date of this RFP until an actual contract is awarded to a grantee, there may be no communications concerning the RFP between any applicant (or their secondary applicant) 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 award decisions. Specifically, applicants are prohibited from contacting members of Regional Leadership Teams and employees of other state agencies who may be involved in the selection process.

The only exceptions to this prohibition are as follows:

1. Communications conducted pursuant to Section 1.8, Internet Q&A Period;
2. As necessary in any pre-existing or on-going business relationship between ODJFS and any applicant that could submit a proposal in response to this RFP;
3. As part of any applicant interview process or proposal clarification process initiated by ODJFS, which ODJFS deems necessary in order to make final selections;
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 applicants through the original web page established for the RFP. All interested applicants must refer to that web page regularly for amendments or other announcements. ODJFS may not specifically notify any applicant of changes or announcements related to this RFP except through the website posting. It is the affirmative responsibility of interested applicants 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 applicants may result in the disqualification of those applicants' proposals.

1.11 Time Frames & Funding Source

ODJFS is seeking to award funding to selected grantees to complete the tasks identified in section 1.5. This RFP contemplates activities conducted within the Research and Analysis/Solutions Development Phase as outlined in the table below. Accordingly, the period of performance is January 4, 2008 through October 15, 2008.

The nine-month Research and Analysis/Solutions Development Phase will receive \$3 million in funding that will be split evenly among the twelve Economic Development Regions – or \$250,000 each.

Grantee WIBs will be eligible to submit Solutions Initiatives Phase grant applications for their EDRs as part of their Regional Solutions Reports.

ODJFS may, at its sole discretion, negotiate with all technically qualifying applicants for a revised service proposal if the services proposed by all technically qualifying applicants are insufficient for the successful completion of this project.

Ohio Skills Bank Initiative – Time Table		
	Start	Finish
Convening & Organizing Phase	August 15, 2007	January 18, 2008
• Regional Leadership Team organization and orientation	October 12, 2007	January 18, 2008
• Development and Completion of Fiscal Agent Applications	October 12, 2007	November 30, 2007
Research and Analysis/Solutions Development Phase	January 4, 2008	October 15, 2008
• Occupational Skills Shortage Report	January 21, 2008	March 31, 2008
• Root Cause Report	April 1, 2008	May 30, 2008
• Regional Solutions Report	June 2, 2008	September 30, 2008
Solutions Initiatives Phase (Yr. 1)	January 1, 2009	December 31, 2009
Solutions Initiatives Phase (Yr. 2)	January 1, 2010	December 31, 2010
Solutions Initiatives Phase (Yr. 3)	January 1, 2011	December 31, 2011

SECTION II. APPLICANT EXPERIENCE AND QUALIFICATIONS

Applicants' proposals must address all the following minimum qualifications as well as organizational and staff experience and capabilities:

2.1 Mandatory Applicant Qualifications

For the purpose of this RFP, ODJFS will only consider proposals from legally designated Workforce Investment Areas (including their respective Administrative Entities and Fiscal Agents).

Applicants that do not meet this criteria will be disqualified from any further consideration for award.

2.2 Organizational Experience and Capabilities

Applicants should outline their specific capacities toward successful regional completion of the OSB Research and Analysis/Solutions Development Phase.

Proposals must demonstrate:

- Capacity of Fiscal Agent (timely and accurate reporting, history of disallowed costs, demonstrated history of past corrective action as required)
- Capacity of Planning Staff/Planning Entity (experience with project management, statistical based research, group facilitation, strategic planning)
- Experience in Sector Strategy Workforce Planning (provide brief background of past projects)
- Experience in Community Planning and Strategic Plan Development

The OSB is a unique program requiring planning and organizational management skills that may go beyond the traditional roles of fiscal agents, One-Stop operations, and related administrative functions. WIBs are encouraged to examine the skill sets and capacity of their existing staff when determining how to best perform the tasks outlined in this RFP.

Based on findings from best practices research, ODJFS encourages that each WIBs give significant consideration to the spending of planning funds on staff that will facilitate the "institutionalization" of the Ohio Skills Bank planning process in an effort to sustain a demand-driven approach to identifying workforce development solutions over the long-run.

If WIBs do not intend to utilize existing employees to conduct the planning activities as outlined in section 1.5, they are encouraged to partner with SMEs. Qualified staff or SMEs will be those who are adept at data-driven research and analysis, organizational leadership/management and building strategic partnerships at the regional level.

ODJFS encourages WIBs to utilize existing regional capacity and advises caution in over-reliance on individuals who are not domiciled within the EDR.

2.3 Staff and SME Experience and Capabilities

Applicants must demonstrate that assigned staff or selected SMEs intended to take key operational roles for this project have expertise in the work being contemplated. Key positions will require profiles and curriculum vitae. Applicants must:

1. Identify, by position and by name, those staff they consider key to the project's success. These staff members should include, at minimum, a designated project manager and a fiscal officer; and
2. Include resume(s) of the specified key staff expected to work on the project. Proposals failing to demonstrate appropriate education and experience will be rated less favorably when compared against competing proposals for the same EDR.

If only one proposal is received from a region and key staff qualifications are deemed inadequate when compared against the work contemplated, ODJFS reserves the right to seek modifications to the proposal.

SECTION III. SCOPE OF WORK & SPECIFICATIONS OF DELIVERABLES

3.1 Scope of Work

WIBs selected as a result of this RFP will serve in two distinct capacities. These roles and responsibilities can be defined as Fiscal and Planning. Functions and responsibilities of these roles include, but are not necessarily limited to the following functions:

3.1. (A) Fiscal Agent

- Fiscal agents will be responsible for fiscal accountability, including budget review, financial reporting, and assurance that WIA spending is in compliance with local, state and federal requirements;
- The fiscal agent will identify planning staff or retain the services of a planning partner; and
- Fiscal agents will conduct their work in alignment with the policy goals of the RLT.

3.1. (B) Planning and Staffing

- Awardees will participate in ODJFS coordinated trainings and all OSB related meetings/events;
- Awardees will provide staff support for the RLT's activities (including but not limited to research and analysis) and assist in producing the required reports; and
- Awardees will deliver the three reports as specified in Section 1.5 to the ODJFS contract manager in a complete manner according to the timeline prescribed by ODJFS.

3.2 Administrative Structures—Proposed Work Plan

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

- Provide a technical approach and work plan to be implemented that highlights the unique attributes of the EDR;
- Provide a current organizational chart (including all planning partners and SMEs) and specify the key management and administrative personnel who will be assigned to this project. Within this chart identify the key point of contact for ODJFS; and

3.3 Specifications of Deliverables

Each EDR will be required to submit OSB Research and Analysis/Solutions Development Phase reports according to the timeline provided in this Section 3.3, below.

The work performed shall include any functions necessary to successfully deliver the aforementioned reports to ODJFS on the prescribed timeline.

Specifications for the format and content of the OSB Regional Research and Analysis/Solutions Development Phase reports are as follows:

Ohio Skills Bank – Research and Analysis/Solutions Development Phase Reports	Due Date
Occupational Skills Shortage Report	March 31, 2008
Root Cause Report	May 30, 2008
Regional Solutions Report	September 30, 2008

3.3. (A) Occupation and Skill Shortages Report – Due March 31, 2008

Introduction: The report must give evidence that a coherent methodology was followed in (i) identifying industries and clusters of industries that are key to the region’s economic development; (ii) identifying occupations and/or skill sets that are critical to the growth of those key industries and clusters of industries; and (iii) producing quantitative estimates of shortages of workers in those critical occupations in the region. The report also must indicate that data and other information were mobilized from all relevant sources. Finally, the report must document that coalition and industry partners were engaged in the process and validated the reports conclusions.

A. Thorough and Logical Methodology. The report should indicate that a logical methodology was employed in accomplishing the tasks outlined in the next three paragraphs numbered below. Such a methodology is outlined and recommended in materials provided by ODJFS. ODJFS will provide training and technical assistance to EDRs in implementing this recommended methodology.

- The report should clearly state how/if recommended methodology is employed, and
- The report should clearly state how/if the region took advantage of the ODJFS-provided training to train staff and develop capacity for demand-driven labor market analysis.
- If an alternative methodology is employed then its logic should be thoroughly explained.
- At a minimum, the methodology employed should indicate a clear understanding of:
 - The meaning of “industries” and “industry clusters” as used in the OSB;
 - The industries and/or clusters of industries that are or will be “key” to the competitiveness and growth of the EDR;
 - The alignment of identified industries and/or clusters of industries with state and/or regional economic development goals;
 - Occupations and skill sets that are critical to the local EDR’s key industries and/or clusters of industries;
 - The distinction between “occupations” and “skill sets;”
 - Labor market (demand and supply) analysis;
 - The meaning of “occupational shortage” and “skills gap” as used in the OSB; and the meaning of “sensitivity” as used in the OSB.

B. Selection and Definition of Key Industries and/or Clusters of Industries. Report must clearly describe the rationale for selecting the region’s key industries or clusters of industries and provide a description of each.

- The report clearly states the reasons for selecting the key industries and/or clusters of industries.
- The report defines the key industries and/or clusters of industries in terms of the NAICS classification system.

C. Selection and Definition of Critical Occupations and Skill Sets. Report must clearly describe rationale for selecting the critical occupations and skill sets for each sector/industry and provide a description of each.

- With respect to both occupations and skill sets, the report provides the reasons for defining them as “critical” to the growth and/or competitiveness of the region’s key industries and/or clusters of industries.
- With respect to occupations, the report provides documentation that these occupations (1) represent strong employment demand and (2) provide good earnings.
- The report describes these critical occupations using standard SOC occupational classification codes, or
- If the critical occupations are deemed “emerging” or are otherwise “non-standard,” then their nature is clearly and fully described.
- All occupational descriptions include (1) the skills and credentials required for entry, (2) career pathways, and (3) typical wages and earnings (i.e., entry and median).

Critical skill sets that cut across multiple occupations are thoroughly described using terminology and categories from one or more of the six US Department of Labor O*NET skill groups (i.e., Basic Skills, Complex Problem Solving Skills, Resource Management Skills, Social Skills, Systems Skills, and Technical Skills – more information on O*NET is available at <http://online.onetcenter.org/>).

D. Specification of the Size and Location of Short and Long-term Occupational Shortages. When occupational shortages are projected, the Report must quantify their size and location. Specifics to be given include:

- Estimates of short-term (2 years) and long-term (10 years) shortages
- Distribution by geographic location (county) and specific key industry and/or cluster of industries.
- As much as possible, specific employers should be named in the report depending on the scope and distribution of the shortage and employer requirements for confidentiality.

Reports will be rated, in part, on employer specificity. Demonstrated employer endorsement of the conclusions reached may be used to judge the merit of OSB Solutions Initiatives Phase grant requests.

E. Specification of Location and Significance of Critical Skills Gaps. When critical skill sets that cut across multiple occupations are determined to be in present or projected shortage, the Report must indicate their location and significance. Specifics to be given include:

- Prevalence and growth of critical skills gaps in specific key industry and/or cluster of industries. Present and anticipated future negative impact (in terms of loss of competitiveness or reduced growth) of critical skills gaps on the specific key industry and/or cluster of industries.

F. Regional Coalition and Industry Partner Engagement. Report must document a truly regional initiative with full engagement throughout from industry representatives in the targeted key industries and/or clusters of industries. A constant focus on those translating skills into bottom line dollars and cents should be evident in all areas of research and evaluation. Specifics to be shown are that:

- All required regional coalition partners were provided the opportunity to give input into the selection and analysis of the industry sectors/industries and critical occupations.
- The selection of sectors/industries was not a result of separate self-interested activities by each participant and/or their component jurisdictions, but was instead conducted on a regional basis.
- Industry partners (i.e. private industry, local economic development officials, members of local training providers, and members of the higher education arena) were involved in all areas of analysis (i.e. selections and definition of sectors/industries, critical occupations, and size of shortages) and fully endorse findings and conclusions.

G. Mobilization and Use of Information from Relevant Sources: Report demonstrates thorough familiarity with the full range of data and other information that is relevant to the study. At a minimum, that includes:

- Previous and existing studies: The report should take full advantage of previous and existing studies and other materials where contents are relevant to the purposes of the Ohio Skills Bank. Among such sources may be the following:
- Economic Development and Workforce Development Reports. Toward the goal of instilling a demand-driven approach to workforce development, reports from economic development organizations need to be juxtaposed with reports and data produced by education and training providers. Regions should take steps to integrate these often separate entities, and should clearly demonstrate these efforts in the Report.

- Labor market and economic databases. Sometimes called “secondary data,” these include a broad array of publicly available industry and occupational data series. ODJFS’ Workforce Informer and LMI Classic web sites furnish a broad selection of data describing employment and other economic trends at the regional and county level. Regions may uncover additional databases to enrich their analyses. These should be incorporated with earnings and wages to highlight earning or occupational outliers.
- Analytical tools such as (but not limited to) Location Quotient Analysis and Shift-Share Analysis.
- Primary Data. Regions should pursue systematic data collection activities that document employer-reported shortages in critical occupations. Samples need to be conducted on a representative sample or full population of employers for the targeted industries/occupations. Specifics as to number of employers participating in surveys as opposed to the number of employers in the region should be included. The OSB training materials provided by ODJFS will indicate appropriate methods for primary data collection.

3.3. (B) Root Causes Report – Due May 30, 2008

A. Thorough and Logical Methodology. The report should indicate that a logical methodology was employed in the determination of root causes. Such a methodology is outlined and recommended in the OSB training materials that will be or are included among the OSB materials provided by ODJFS. In addition, ODJFS will provide training to assist regional planning staff in implementing this recommended methodology.

- The report should clearly state how/if recommended methodology is employed, and clearly state how/if the region took advantage of the ODJFS-provided training to develop staff capacity for demand-driven labor market analysis.
- If an alternative methodology is employed then its logic should be thoroughly explained.
- A discussion of the following is required:
 - Employer Recruitment and Retention. Report should address potential supply and demand side causes for how employers in the key industries and/or clusters of industries recruit and retain employees in the shortage occupations. Causal relations between the two sides should be noted.
 - Education and Training Capacity and Student Completion/Placement. Report should address any problems with training strategy, capacity, options, dropout rate, etc, and its subsequent effects on the ability to produce graduates to meet identified occupational and/or skill shortages.
 - Student/Worker Career Awareness Access. Report should discuss potential problems with making students and/or workers aware of career opportunities and assisting student and/or workers in getting the necessary prerequisite skills to enter training and find employment in the identified shortage occupations.
 - Wage Rates and Benefits. Report should, within key industries and/or clusters of industries, look across the EDR and beyond to find variations in wages and benefits and then provide explanations for differences (if any).

B. Regional Coalition and Industry Partner Engagement. Report must document a truly regional initiative with full engagement throughout from industry representatives in the targeted sectors/industries. A constant focus on those translating skills into bottom line dollars and cents should be evident in all areas of research and evaluation. Specifics to be shown are that:

- All required regional coalition partners were provided the opportunity to give input into the determination of root causes.
- The identification and analysis of root causes was conducted on a regional basis and was not the result of separate self-interested activities by individual participants and/or their component jurisdictions, but was instead conducted on a regional basis.
- Industry partners (i.e. private employers, local economic development officials, members of local training providers, and educators) were involved in the analysis and validation of findings and conclusions on root causes. They fully endorse the findings and conclusions of the report by supplying letters of support.

C. Description of Root Causes and Their Impacts. Report must clearly describe each root cause and its relative importance in addressing skill shortages. The body of the Root Cause Report should include:

- Evidence as to how each root cause was identified.
- A ranking of each root cause by relative importance and their respective contributions to the projected short and long-term shortages.
- A **qualitative** assessment of the sensitivity of the projected future occupational and/or skill shortage to changes in the root cause.
- A **quantitative** estimation of the reduction of the future occupational and/or skills shortage in response to specific levels of reduction of the root cause.

3.3. (C) Regional Solutions Report – Due September 30, 2008

A. Thorough and Logical Methodology. The report should indicate that a logical methodology was employed in the development of the regional solutions. Such a methodology is outlined and recommended in the OSB training materials provided by ODJFS. In addition, ODJFS will provide training to assist regional staff in implementing this recommended methodology.

- The report should clearly state how/if recommended methodology is employed, and
- The report should clearly state how/if the region took advantage of the ODJFS-provided training to develop staff capacity for demand-driven labor market analysis.

If an alternative methodology is employed then its logic should be thoroughly explained.

B. Description of Solutions. Report must clearly describe the solutions and give evidence as to how they will have a direct effect on the root causes. Specifics to be shown are:

- Rationale for each solution and evidence that the solution is feasible.
- Evidence that the solution has potential to address short and long-term shortages.
- Estimate of the contribution of each solution to the reduction of short and long-term shortages. Identification of which solutions are short-term and which are long-term.

C. Action Plan. The report provides an action plan for implementing these solutions that minimally includes:

- Who Will Do What? The action plan describes what organizations (e.g., industry organizations, training providers) will be responsible for what activities in implementing the strategies and when these activities will be started and completed.
- Results: The action plan describes the expected results from these activities and their contributions toward reducing the short-term and/or long-term shortages (i.e., how much they will reduce the size of the shortages).

Reallocating/Leveraging of Existing Public and Private Resources. The action plan identifies how existing regional resources will be reallocated and leveraged to carry out the planned activities. The plan clearly specifies the dollar amount of public funds that will be redirected/leveraged by funding source. The plan clearly specifies the dollar amount of funds (including in-kind) provided by regional stakeholders.

D. Regional Coalition and Industry Partner Engagement. Report must document a truly regional initiative with full engagement throughout from regional industry representatives in the targeted key industries and/or clusters of industries. A constant focus on those translating skills into bottom line dollars and cents should be evident in all areas of research and evaluation. The report must show that:

- All required regional coalition partners were provided the opportunity to give input into the development of solutions.
- The development of solutions was not a result of separate self-interested activities by each participant and/or their component jurisdictions, but was instead conducted on a regional basis.
- Industry partners (i.e. private industry, local economic development officials, members of local training providers, and educators) were involved in all areas of analysis (i.e. descriptions of solutions, response from outside agencies) and fully endorse findings and conclusions.

E. Funding Request. Report must contain a detailed listing of the funds requested to implement solutions. Specifics to consider when preparing this portion of the report include:

- Justification for funds
- Appropriateness of funds to reasonable project goals.
- “Line of Sight” approach demonstrating how individual solutions will correct the previously-identified occupation and skill shortages at the root cause level.
- One-time funds vs. recurring funds.

F. Response from Outside Agencies. Many solutions will involve participation from outside agencies (i.e. high schools, colleges, hospitals, businesses, etc.), and successful implementation of solutions relies upon active involvement throughout the planning process by these community partners. Accurate estimates, feasibility predictions and timelines can only be provided with direct support from these agencies. The report must provide evidence that any outside agencies that will be directly involved in implementation of solutions were consulted during the design of the solutions, given opportunity to participate in solution design and the extent of their actual involvement. Report specifics that must be shown are:

- A detailed description of the outside agencies' responses to the proposed solutions.
- A discussion of how much the agencies plan to be involved in the Solutions Initiatives Phase.
- How the agencies' planned involvement changes or confirms:
 - Feasibility of the solution.
 - Estimation of the contribution of each solution to the reduction of short and long-term shortages.

G. Timeline. Report should contain a timeline for the implementation and execution phase. Specifics to consider while preparing this portion of the report include:

- Important dates during implementation.
- Responsible parties.
- Resource/Funding Allocation.

H. Sustainability Measures. Report should outline how the region will sustain the Solutions Initiatives Phase-funded projects as State-supplied funds draw down and end after the third year of implementation. Considerations to take into account include, but are not limited to, financial support from employers, industry consortia or municipalities; tuition payments; in-kind support and other grant sources. Sustainability after the state-funded start-up period will be a key consideration in judging the relative strength of Solutions Initiatives Phase grant requests.

I. Performance Measurement. Report should contain a detailed account of how the region plans to track the success of their proposed solutions. To ensure that shortages are actually being alleviated, the region should create a measurement/evaluation of their success in implementing the OSB to date. Important questions to be answered in the document are:

- How closely was the proposed timeline followed?
- How efficiently were funds used?
- How much, specifically compared to the estimates, were the shortages actually reduced?
- How prevalent does the shortage remain?
- How have the sectors/industries and or clusters of industries of industries responded to the implemented solutions.

In addition, ODJFS may prescribe performance measurements upon which all solutions will be based.

3.4 Proposed Budget, Budget Narrative and Selected Applicant Compensation Structure

Applicants must provide a budget (refer to Section 8.4) for the project, including an estimate for the staff hours and salaries for relevant personnel and planning staff. The ODJFS share of the EDR Research and Analysis/Solutions Development Phase budget shall not exceed \$250,000. Any additional sources of funding beyond the \$250,000 that may be awarded by ODJFS must be identified in the budget as leveraged resources. A Budget Narrative must be provided as described in Section 8.4.

The Ohio Department of Job and Family Services has a Subgrant Agreement in place with each Workforce Investment Area in Ohio. This agreement gives the WIA Areas the authority to legally draw and expend WIA funds. With this RFP, the WIA Area fiscal agents will be acting in the same capacity

as spelled out in their existing Subgrant agreements. The funds awarded as result of this RFP stem from a uniquely identified funding stream from which the Areas can report expenditures and draw funds against, *e.g.*, Youth Settlement, Rapid Response, BRAC, etc.

The ODJFS Office of Fiscal Services will issue “notices of awards” through allocation letters to each selected OSB project and fiscal agent that specify the purpose of the funding and any deliverables associated with the funding. Funds shall be allocated via an Allocation Letter(s) from ODJFS to the Subrecipient. Costs incurred under this agreement are limited to \$250,000 per award and may not exceed the amount allocated by the Allocation Letters. OSB awardees must disclose and identify any additional outside funding or resources which will be utilized for the OSB Research and Analysis/Solutions Development Phase project

WIA Areas will be required to report accruals, expenditures and submit cash flow forecasts similar to their existing WIA reporting structures in order to draw down cash to reimburse themselves or their planning partners. The WIA Areas will utilize the CORE system to complete all mandatory reporting requirements. In addition, awardees may be required to provide detailed quarterly budget and expense data to the Office of Workforce Development.

Commencement of expenditures is subject to the issuance of the allocation letters. Funds under this grant are based in whole or in part upon federal funding. Should the external source of the funding be terminated or reduced for reasons beyond the control of ODJFS or the State of Ohio, this grant shall terminate as of the date the funding expires without further obligation of ODJFS or the State of Ohio. Additionally, pursuant to R.C. Section 126.07, availability of funds is contingent on appropriations made by the Ohio General Assembly. If the Ohio General Assembly fails at any time to continue funding ODJFS for the funds described in this grant, the grant is terminated as of the date funding expires without further obligation of ODJFS or the State of Ohio.

SECTION IV. CONDITIONS AND OTHER REQUIREMENTS

Through this section of the RFP, ODJFS notifies applicants seeking award 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

Applicants must complete a copy of the Required Applicant Information and Certifications Document (provided as **Section 8.1.**) and include the completed document in the applicant’s proposal as specified in **Section 5.2 B., 1** of this RFP.

4.2 Interview

Applicants 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, the EDR’s RLT and/or other state or county agency staff or other representatives it may appoint, as appropriate. ODJFS

reserves the right to select from responding applicants for interviews and may not interview all applicants submitting proposals. The applicant shall bear all costs of any scheduled interview.

4.3 Start Work Date

The selected applicant must be able to begin work no later than January 4, 2008. The selected applicant will be notified by the ODJFS project manager when work may begin. **Any work begun by the applicant 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 applicant, and ODJFS will not contribute in any way to the costs of the preparation. Any costs associated with interviews will be borne by the applicant and will not be ODJFS' responsibility (see Section 4.2, above).

4.5 Trade Secrets Prohibition; Public Information Disclaimer

Applicants 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 applicants regarding applicant 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 applicant, 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 Travel Reimbursement

Travel may only be listed separately if specifically permitted in Section 8.4, the Project Budget Form of this RFP.

4.7 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 applicants 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 applicant is strongly encouraged to subcontract a minimum of fifteen percent (15%) of the total contract price to an Ohio certified MBE.

Applicant WIBs are encouraged to consider MBEs as potential planning partners. A listing of Ohio certified MBEs can be accessed through the Ohio Department of Administrative Services (DAS) Web Site at: <http://das.ohio.gov/Eod/MBESearch/index.asp>.

While ODJFS strongly encourages the use of MBE subcontractors, the applicant's use of an MBE subcontractor will have no effect on applicants' 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 Proposal Score Sheet for this RFP) affirmatively establish an MBE participation criterion.

4.8 Subcontractor Identification and Participation Information

Any applicants proposing to use a subcontractor for any part of the work described in this RFP must be prepared to clearly identify the subcontractor(s) and their tasks to ODJFS upon request.

Information requested may include but is not limited to:

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 applicant 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.

4.9 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.

4.10 Confidentiality

All 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.

4.11 Key Personnel

ODJFS will require a clause in the resulting agreement 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.

4.12 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.

4.13 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 applicant 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.

4.14 Waiver of Minor Proposal Errors

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

4.15 Proposal Clarifications

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

4.16 Contractual Requirements and Prevailing Wage Requirements

Any award resulting from the issuance of this solicitation is subject to the terms and conditions as provided in the model Allocation Letter, which is provided as **Section 8.2** to this RFP. Potential applicants are strongly encouraged to read the model Notice of Award and to be fully aware of ODJFS' requirements. Additionally, the selected WIB will be required to comply with prevailing wage standards, as established in ORC 4115.03-4115.16.

4.17 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 applicant 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 applicant whose name, or the name of any of the subcontractors proposed by the applicant, appears on the website of the Auditor of the State of Ohio as having an “unresolved” finding for recovery.

4.18 Mandatory Contract Performance Disclosure

Each proposal must disclose whether the applicant’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, applicant 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 an applicant from consideration, at the sole discretion of ODJFS, such claims and a review of the background details may result in a rejection of the applicant’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 applicant’s performance of the work, and the best interests of ODJFS.

4.19 Mandatory Disclosures of Governmental Investigations

Each proposal must indicate whether the applicant 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 applicant’s performance of services similar to those described in this RFP. If any such instances are disclosed, applicant 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 applicant by the governmental agency. While disclosure of any governmental action in response to this section will not automatically disqualify an applicant from consideration, such governmental action and a review of the background details may result in a rejection of the applicant’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 applicant’s performance of the work, and the best interests of ODJFS.

4.20 Applicant Selection Restriction

Any applicant deemed not responsible, or submitting a proposal deemed not to be responsive to the terms of this RFP, shall not be awarded funding for the project that is the subject of this RFP.

4.21 Ohio Presence Consideration

Applicants must disclose the physical location of all fiscal agent and planning partner staff. ODJFS reserves the right at its sole discretion to give evaluation preference to proposals showing all such staff being located in their EDR and/or the state of Ohio.

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 **2** paper copies (**one signed original and one copy**) and one CD-ROM copy of the entire proposal package including all required attachments and the completed project budget. All digital documents must be submitted in either Adobe Acrobat (PDF), Microsoft Word (DOC), or Microsoft Excel (XLS).

The applicants' total proposal submissions (including all required materials) must be received by ODJFS complete no later than 3:00 p.m. on December 17, 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, 31st Floor
Columbus, Ohio 43215-3414**

ATTN: RFP/RLB Unit

Applicants' original technical proposals and project budgets 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 original proposal must include copies of ALL information, documents, and pages in the original proposal.

The CD-ROM copy of the Proposal and Budget must include all components of the proposal, including any required or voluntary attachments to it. The CD-ROM must be labeled with the applicant's name, the RFP number, and the proposal submission date or proposal due-date, at minimum. The requested CD 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 applicant 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. Any required materials received separately from an applicant's proposal submission 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, applicants are to allow sufficient time for downtown parking considerations, as well as for security checks at both the lobby of the Rhodes State Office Tower (address as stated above) and again on the 31st Floor. All proposals received on the due date by the Office of Contracts & Acquisitions, on the 31st 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 applicant 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 applicant selected.

5.2 Format for Organization of the Proposal

A. Overall Proposal Organization

A sample Proposal Score Sheet is provided as **Section 8.5** of this RFP. **Applicants are strongly encouraged to use the Score Sheet to check their proposals for quality, compliance, and completeness prior to submission.**

The applicant's Proposal must contain the following components (organized in five (5) 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.

Applicants must organize their Proposals in the following order:

- Tab 1** Cover Sheet (see Section 8.1)
 - Required Applicants' Information and Certification Document
 - Executive Summary (Optional; if provided, may be no more than three pages)

- Tab 2** Applicant Experience & Qualifications
 - Sub-Tab 2.1.** Mandatory Applicant Qualifications
 - Sub-Tab 2.2.** Organizational Experience & Capabilities
 - Sub-Tab 2.3.** Staff Experience and Capabilities

- Tab 3** Scope of Work and Specifications of Deliverables
 - Sub-Tab 3.1.** (A) Fiscal Agent Role
 - Sub-Tab 3.1.** (B) Planning Role

Sub-Tab 3.2. Administrative Structures—Proposed Work Plan & Organizational Chart

Sub-Tab 3.3. Specification of Deliverables (Section 3.3 A-G)

Tab 4 Project Budget and Budget Narrative (As established in Section 3.4)

Tab 5 Applicant Attachments or Appendices

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

B. Proposal Details

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

1. (Tab 1) Cover Sheet, Required Applicant Information & Certifications Executive Summary (Optional)

In this section, the applicant is required to provide required information for eligibility for award, as described in **Section 8.1** to this RFP, entitled "Required Applicant Information & Certifications Document." Applicants may, at their discretion, either print **Section 8.1**, 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 **Section 8.1**) on their own letterhead, properly signed (in blue ink), and use that document as the content of their Proposal Tab 1. Applicants who fail to provide all information as described in **Section 8.1** in their Proposal Tab 1 risk disqualification.

The signed original of the above referenced form (RFP Section 8.1) is to be provided in the applicant's original proposal.

In order to be acknowledged as an applicant with an Ohio presence (Section 4.24, Ohio Presence Consideration) for scoring consideration, applicants must disclose the physical location of all fiscal agent and planning partner staff. ODJFS reserves the right at its sole discretion to give evaluation preference to proposals showing all such staff being located in their EDR and/or the state of Ohio.

2. (Tab 2) Applicant Experience & Qualifications

a. Mandatory Applicant Qualifications (Sub-Tab 2.1)

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

b. Organizational Experience and Capabilities (**Sub-Tab 2.2**)

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

c. Staff and SME Experience and Capabilities (**Sub-Tab 2.3**)

Under this section the applicant is required to include resumes, document education and experience, and list any 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**.

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

This section should describe in detail how the applicant proposes to perform each task of the scope of work identified in Sections 3.1 including the role of the Fiscal Agent [Section 3.1 (A)] and the Planning role [Section 3.1 (B)], Administrative Structures (Section 3.2) and Specification of Deliverables (Section 3.3). Realizing that the work of creating deliverables has yet to be done, applicants should devote most of their effort in this section outlining how their past experience will positively influence the outcomes (citing specific examples where possible).

**4. (Tab 4)
Project Budget and Budget Narrative**

Applicants must provide a budget (refer to Section 8.4) for the project, including an estimate for the staff hours and salaries for relevant personnel and planning staff. Any additional sources of funding beyond the \$250,000 maximum awarded by ODJFS must be identified in the budget as leveraged resources. A Budget Narrative must also be provided as described in Section 8.4.

**5. (Tab 5)
Applicant Attachments or Appendices**

This section may include excerpts/samples of relevant work products. If none are provided, applicants should include a statement to that effect.

D. IMPORTANT – APPLICANT DISQUALIFIER FOR PROPOSAL ERRORS:

Any trade secret, proprietary, or confidential information (as defined in Section 4.5 of this RFP) found anywhere in an applicant's proposal shall result in the proposal's immediate disqualification.

SECTION VI. CRITERIA FOR PROPOSAL EVALUATION & SELECTION

6.1 Scoring of Proposals

ODJFS will award grants to applicants that best demonstrate the ability to meet requirements and goals as specified in this RFP. Applicants submitting a response will be evaluated based on the capacity and experience demonstrated in their Proposal. All proposals which meet Phase I Initial Qualifying Criteria will be reviewed and scored by a Proposal Review Team (PRT), comprised of staff from ODJFS, Ohio Department of Development, Ohio Board of Regents, Ohio Department of Education, and/or other designees. Applicants 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, and lack of proofreading 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 applicants 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 applicant 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 1.7 and 5.1?
2. Is the proposal from a legally designated Workforce Investment Area?
3. Is the fiscal agent authorized to administer Workforce Investment Act (WIA) funds within the EDR in question?
4. Does ODJFS’ review of the Auditor of State website verify that the applicant is not excluded from contracting with ODJFS by ORC Section 9.24 for an unresolved finding for recovery (*i.e.*, the proposal of any applicant whose name appears on the Auditor’s website as having an unresolved finding for recovery will be eliminated from further consideration.)?

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

The PRT will then score those qualifying proposals, not eliminated in Phase I Review, by assessing how well the applicant 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 **Section 8.3** of

this RFP for specific evaluation criteria), the PRT will read, review, discuss and reach consensus on the final technical score for each qualifying proposal.

A maximum of 100 points will be awarded for the Proposal. A proposal must achieve a total of at least **75** points (a score which represents that the applicant can successfully perform the resulting contractual duties) out of the possible 100 points to qualify for continued consideration. Any proposal which does not meet the minimum required proposal points will be disqualified from any further consideration..

All Phase II proposal evaluation criteria will be scored according to the following scale, based on a proposed plan’s ability to meet ODJFS needs. The Proposal Scoring Matrix (see **Section 8.3, Attachment 8.3**) uses the following point values for rating each requirement.

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

Performance Scoring Definitions:

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

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

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

“Exceeds Requirement”-Applicant 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, applicants are strongly encouraged to use the Proposal Scoring Matrix (Attachment **8.3**) and the above performance scoring information to review their proposals for completeness, compliance and quality.

6.2 Review Process Caveats

ODJFS may, at its sole discretion, waive minor errors or omissions in applicants’ Proposals when those errors do not unreasonably obscure the meaning of the content.

The PRT reserves the right to request clarifications from applicants to any information in their Proposals, 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

applicants' verbal or written response to those requests, shall not be considered a violation of the communication prohibitions contained in Section 1.10 of this RFP. Such communications are expressly permitted when initiated by ODJFS as the agent of the PRT, but are at the sole discretion of ODJFS.

Should the PRT determine a need for interviewing applicants 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 applicants' 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 applicants participating in the interview process for that RFP.

ODJFS reserves the right to negotiate with applicants 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 applicant 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 Applicant Recommendations

The PRT will recommend to the Director of ODJFS the technically qualified applicants offering the proposals for each EDR that are most likely to successfully achieve the goals and objectives of the Ohio Skills Bank, as determined by the processes and requirements established in this RFP. Should more than one proposal be submitted for any given EDR, the award will be made to the proposal earning the highest technical proposal score.

6.4 Tie Breaker

In the event that two or more proposals seeking to serve the same EDR have a score which is tied after final calculation, the proposal receiving the endorsement of the Chief Workforce Officer of the State of Ohio, in consultation with the respective Regional Leadership Team, will receive the award.

SECTION VII. PROTEST PROCEDURE

7.1 Protests

Any potential, or actual, applicant objecting to any of the awards resulting from the issuance of this RFP may file a protest of the awards, 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 any of the awards 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;
 6. The EDR whose award is in question; and
 7. 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 1.7, Anticipated Procurement Time Table, of this RFP.
 2. If the protest relates to the announced Notice of Awards, the protest shall be filed no later than 3:00 p.m. of the eighth calendar day after the issuance of the Notice of Award.
- 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 applicant(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 applicant 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 applicant should ODJFS decide not to proceed. Changes in this RFP of a material nature will be provided via the agency website. All applicants are responsible for obtaining any such changes without further notice by ODJFS.

SECTION VIII. ATTACHMENTS (see links from RFP webpage for the following:)

- 8.1 Required Applicant Information and Certifications**
- 8.2 ODJFS Model Allocation Letter**
- 8.3 Proposal Scoring Matrix**
- 8.4 Project Budget**

SECTION IX. APPENDICES (see links from RFP webpage for the following:)

- 9.1 Ohio Skills Bank Initiative Design Document**
- 9.2 Economic Development Regions (EDR) Map**