

***Request for Proposals  
Centralized Paternity Registry (CPR)  
Services***

***RFP#:R-89-09-8009***

**Ohio Department of Job and Family Services**

**Office of Child Support**

***February 11, 2009***

# Centralized Paternity Registry (CPR) Services RFP

RFP#: R-89-09-8009

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## **ODJFS REQUEST FOR PROPOSALS (RFP):**

### **Central Paternity Registry (CPR) Services**

**RFP#: R-89-09-8009**

## **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 obtaining a vendor to provide statewide Centralized Paternity Registry (CPR) services. The paternity registry is mandated by Section 3111.64 through 3111.67 of the Ohio Revised Code (ORC) and Section 5101:12-40-30 of the Ohio Administrative Code (OAC). ODJFS is seeking vendors who demonstrate significant experience with child support programs and paternity establishment, regulations of Title IV-D of the Social Security Act, and management of large-scale projects. ODJFS seeks vendors who: are able to provide the high level of customer service deserved by the public; have accurate and efficient data entry capabilities; have management capabilities to process large volumes of legal documents; have experience in providing training and call-center services to consumers; are responsive to the needs of the public, hospital partners, and state personnel; and are able to work collaboratively with the Ohio Department of Vital Statistics regarding the data tracking demands of this program.

In the state fiscal year (SFY) ending June 30, 2008, 59,793 paternity documents were processed in Ohio. Additionally, the current CPR contractor responded to approximately 250 - 300 calls per week, primarily from parents, hospital staff, registrars, Child Support Enforcement Agencies (CSEAs), and courts.

### **1.2 Issuing Office**

This RFP is released by and the subsequent contract will be with ODJFS. ODJFS Office of Child Support (OCS), which will administer the contract, will be responsible for state level supervision of all activities of the selected vendor.

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

### **1.3 Background**

In Ohio, approximately 56,000 children are born out of wedlock each year. ODJFS is the single state agency charged with the responsibility of the administration of Title IV-D of the Social Security Act which requires the establishment of paternity and support. For children born out of wedlock, paternity can be established with an affidavit of paternity, an administrative order, or a court order. Paternity establishment is a necessary first step in the process of setting a child support order. In addition to a child support order, paternity establishment may result in eligibility for financial benefits including Social Security, pension benefits, veterans benefits, and inheritance benefits. Paternity establishment may also provide psychological and social bonds between father and child, and provide important medical history information.

Unmarried parents can establish paternity by voluntarily signing an affidavit of paternity, naming the biological father as the legal father. Federal regulations require that the paternity affidavit must be signed by the biological father before his name can be recorded on the child's birth record (birth certificate). At the time of birth, while still in the hospital, a great opportunity exists to educate the parents on the importance and benefits of establishing paternity, as well as providing them with the paperwork to do so. The Ohio Central Paternity Registry works closely with each birthing hospital to ensure they have the knowledge and tools to assist parents in completing affidavits of paternity.

In 1997, after federal regulations required all states to establish centralized paternity registries, Ohio House Bill 352 mandated the creation of a centralized database of all parentage actions for children born out of wedlock. The database currently has more than 604,000 records that have been processed since January 1, 1998. During SFY 2008 (July 1, 2007 through June 30, 2008), the current CPR contractor has processed 59,793 documents.

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

The selected vendor will be responsible for the day-to-day operations of the centralized paternity registry for OCS. The main functions of the registry include the receipt and processing of all paternity documents (affidavits, administrative orders, rescissions, and court orders), and the creation and maintenance of a single database that contains specific information from each paternity document. The selected vendor shall be responsible for interfacing electronically with ODJFS and the Ohio Department of Health (ODH).

The selected vendor will enter into contracts with birthing facilities and local registrars to establish performance standards for the completion of and reimbursement for correctly completed affidavits, and will provide technical assistance regarding the affidavit process, and will reimburse birthing facilities and registrars \$20.00 per each completed valid affidavit. The current CPR contractor facilitated payments to birthing facilities and registrars totaling \$784,320 during SFY 2008.

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

The vendor's objectives will be to: 1) operate a central paternity registry that fulfills the state plan requirements of establishing a single point of contact for all paternity actions in the state; 2) serve as a place for parents, hospitals, registrars, courts, and CSEAs to get responses to questions regarding procedures or specific cases; 3) perform data entry for each paternity document to retrieve information from each action so a database can be maintained for easy tracking; 4) after data entry, forward all paternity documentation to ODH; 5) send electronic transmissions (currently twice a week) to ODJFS and ODH.

**1.6 Anticipated Procurement Timetable**

DATE	EVENT/ACTIVITY
February 11, 2009	ODJFS Releases RFP to Potential Vendors on ODJFS Web Site; Q&A Period Opens - RFP becomes active - Vendors may submit inquiries for RFP clarification
February 23, 2009	Vendor Q&A Period Closes, 10 a.m. (for inquiries for RFP Clarification) - No further inquiries for RFP clarification will be accepted
February 26, 2009	ODJFS provides Final Vendor Question & Answer Document (estimated)
<b>March 17, 2009</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
<b>March 31, 2009</b>	<b>ODJFS announces awarded (estimated)</b>
May 18, 2009	Controlling Board Review of Contract (estimated—if applicable). -Contract with the selected vendor requires review and approval
June 1, 2009	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.
7/01/11 – 6/30/13	* * Possible renewal period

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 July 1, 2009 through June 30, 2011, with a renewal contract to be in effect, contingent upon satisfactory contractor performance, continued availability of funding, and all required approvals, from July 1, 2011 through June 30, 2013. Since state law prohibits ODJFS from making financial commitments

beyond the fiscal biennium (e.g., 7/01/09 through 6/30/11), the contract with the selected vendor will be subject to renewal for the final two (2) year period of the project. Renewal may be subject to approval by the Controlling Board.

### **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 *R89098009*;**
- \* **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 Vendors' 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 one vendor to provide Central Paternity Registry services from approximately July 1, 2009 to June 30, 2011, subject to approval by the Controlling Board. A two year renewal period is possible at the discretion of ODJFS, contingent upon satisfactory performance, continued availability of funding, and upon all necessary contractual and funding approvals from July 1, 2011 through June 30, 2013.

Since state law prohibits ODJFS from making financial commitments beyond the fiscal biennium (i.e., June 30, 2011), the contract with the selected vendor will be subject to renewal for the period of July 1, 2011 through June 30, 2013. 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 6.1 C. of this RFP establishes further information on ODJFS procedures to be implemented if this occurs.

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

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

### **2.1 Mandatory 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, **all** the following qualification requirements:

1. ODJFS will consider proposals from vendors with a minimum of five (5) years of experience implementing and managing successful child support programs on a large scale. Proposals must demonstrate that the vendor has processed at least 55,000 paternity documents per year for each of the past five (5) years, at minimum, as well as its ability to process at least that volume level currently and or the duration of the ODJFS CPR contract term.
2. The designated Project Manager/Office Manager must have at least five (5) years child support experience and possess at least a bachelor's degree in social sciences; marketing or business; public policy; or other related field.
3. The vendor must submit a proposal comprised of a Technical Proposal and, in a separate, appropriately labeled, sealed envelope, a Cost Proposal.

4. The vendor's proposal must include all required affirmative statements and certifications, signed by the vendor's responsible representative, as described in Attachments A and C to the RFP.
5. The vendor may not be excluded from entering into a contract with ODJFS, due to restrictions related to the federal debarment list, unfair labor findings, or as established at O.R.C. § 9.24.

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

## **2.2 Organizational Experience and Capabilities**

In order to be considered for the contract expected to result from this RFP, ODJFS requires that interested vendors provide the following:

1. A minimum of five (5) years of experience implementing and managing successful child support programs on a statewide basis or a large-scale program affecting at least 55,000 persons/cases annually; vendor staffing of the proposed project must include persons proficient in child support program requirements, particularly knowledge of paternity;
2. Demonstration of its knowledge of general Title IV-D program requirements, specifically familiarity with regulations surrounding paternity establishment;
3. At least five (5) years demonstrated experience in managing a project involving the editing/data entry of at least 55,000 documents per year;
4. Significant experience performing a similar service for state-wide programs involving daily client contact including call center operation, publishing of brochures, posters, and training DVDs;
5. Experience producing DVDs for hospitals, registrars and their clients for educational and instructional purposes;
6. Experience producing professional quality tri-fold brochures for mass distribution during the years of the contract;
7. Sufficient data-entry personnel to enter data from approximately 55,000 documents per year; and
8. Sufficient staff to handle approximately 250 – 300 calls per week and 20 emails per month.
9. Information on the background of the firm; including any subcontractors; and any prior experience relevant to this RFP;
10. Narrative descriptions of at least two similar sized projects completed in the past five (5) years that demonstrate expertise in establishing paternity for child support clients (ODJFS will review only up to four such narratives per proposal); and

11. Names and contact information for at least three (3) entities for which the vendor has performed similar large scale projects in the past five (5) years.

**Details such as the size of the organizations, duration of involvement, level of responsibility, significant accomplishments, as well as a thorough description of the nature of the experience will be required for appropriate evaluation by ODJFS.**

### **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 and resumes. The vendor must, at minimum:

1. Identify, by position and by name, those staff they consider key to the project's success (at minimum, key staff identified must include a project manager); and
2. Include resume(s), education and pertinent experience of the Project Manager and all key personnel for this project (including any subcontractors), and should specifically list their qualifications and experience (in the areas described in Section III, Scope of Work and Specifications of Deliverables of this RFP, see Sections 3.1 and 3.4) of key staff expected to work on the project;
3. Key staff must have at least a bachelor's degree in social work, public administration or related degree. Vendor must also demonstrate that key vendor staff have a minimum of five (5) years of child support program experience.
4. Identify and assign a staff person or subcontractor who will manage the video/DVD and brochure development, production, and any applicable training. The assigned video manager must possess at least five (5) years experience in video development/production and training.

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

### **3.1 Scope of Work**

The following information is a summary of the duties and responsibilities of the selected vendor; further details are provided in Section 3.4, Specifications of Deliverables. In order to receive consideration for contract award, all aspects of the work described in this section must be addressed in the vendor's technical proposal.

Vendor proposals submitted in response to this RFP must reflect the vendor's understanding of, and commitment to, perform this Scope of Work fully. The selected vendor will be responsible for the deliverables as described in Section 3.4, including all preparatory and intervening steps, whether or not ODJFS has explicitly specified or delineated them within the RFP. In developing their proposals, all vendors must fully and appropriately plan and cost out their proposed projects, including all necessary preparatory and intervening steps.

1. Perform specialized functions in compliance with the federal mandate for centralized paternity services, in order to assist the CSEAs in establishing support orders for children born out of wedlock;
2. Establish an office in the metropolitan Columbus, Ohio area, appropriately staffed, where documents are reviewed and data is entered, and where call-center services are provided. The primary functions to be performed in the office include the comprehensive review of affidavits, administrative orders, rescissions and court orders submitted by hospitals, registrars, CSEAS, parents and courts from across Ohio. Office staff will also answer approximately 250 – 300 calls per week and 20 emails per month (estimate based on current volume) on CPR procedures;
3. Provide payment to birthing facilities, and registrars for all submitted, valid paternity affidavits.
4. Transmit data electronically to ODJFS and ODH on a twice-per-week basis, and forward hard copies of all paternity documentation to ODH at least twice a week; and
5. Produce and distribute DVDs for hospitals, registrars and their clients for educational and instructional purposes, and provide and distribute professional quality tri-fold brochures, during the term of the contract.
6. Submit monthly invoices to OCS which include the amounts paid to birthing facilities and registrars for the submission of valid affidavits as well as amounts owed for other deliverables. as amounts for other services performed by the contractor and listed on the contractor's accepted cost proposal. The invoice must be submitted on vendor letterhead, and the billing date and service date must be included on the invoice. Back-up documentation must include an electronic list of hospitals and registrars receiving payments for valid affidavits during the invoice month. Invoices must be forwarded to a specific ODJFS address, which will be provided to the selected contractor; and
7. Arrange with the current CPR contractor for the ownership transfer of the current post office box number, phone number, and dedicated fax lines for project operations, immediately upon notification of contract effectiveness. Vendor will be responsible for the proper and timely handling of any CPR-related communications submitted to the P.O. Box or via fax lines.
8. Provide training regarding the paternity affidavit process to hospitals, registrars, and CSEAs and judicial bodies during conferences, site visits, and video conferences.

### **3.2 Number of Participants**

N/A

### **3.3 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 status reporting procedure for reporting work completed, and resolution of unanticipated problems;

- B. Provide a current organizational chart (including any subcontractors) and specify the key management and administrative personnel who will be assigned to this project; and
- C. Provide a timeline for all initial and preparatory phases of the work.

### 3.4 Specifications of Deliverables

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

#### A. **General Administrative Requirements**

1. Developing and testing software to assure successful data entry can be completed, and then maintaining that capability throughout the effective term of the contract. The electronic medium for data transfer must be approved by the ODJFS Office of Information Services. The current CPR contractor transfers data via File Transfer Protocol (FTP) transmission;
1. Entering into agreements with at least 123 birthing facilities for the purpose of the completion of paternity affidavits and payment of appropriate fees.
2. Maintaining the system and all data backups. ODJFS has ownership of all data, and within 180 days of the contract end date, all data must be forwarded to ODJFS in an electronic format agreed to by ODJFS;
3. Submitting a monthly invoice to OCS which includes the amounts paid to birthing facilities and registrars for the submission of valid affidavits as well as amounts owed for other deliverables. The invoice must be submitted on vendor letterhead, and the billing date and service date must be included on the invoice. Back-up documentation must include an electronic list of hospitals and registrars receiving payments for valid affidavits during the invoice month. Invoices must be forwarded to a specific ODJFS address, which will be provided to the selected contractor; and
4. Reimbursing the facilities (birthing facilities/registrars) \$20.00 for each correctly completed affidavit. Vendor will advance payments to the facilities and will invoice ODJFS on a monthly basis. **IMPORTANT:** Vendors are to include the amount of funds to be passed through from ODJFS to facilities for affidavit completion as a separate line item on their Cost Proposals. For contract purposes, ODJFS will obtain a purchase order for the amount of the selected vendor's accepted cost proposal plus an amount appropriate for payments by the contractor to birthing facilities for completed affidavits. The amount made available to the selected contractor for completion of this deliverable will be based on historical volume and projections, and may be increased by ODJFS if actual use exceeds projections. Actual use of funds for this purpose by the selected contractor must be fully documented. Vendor must assure that payments are made promptly and accurately;
5. Arranging with the current CPR contractor for the ownership transfer of the current post office box number, phone number, and dedicated fax lines for project

operations, immediately upon notification of contract effective date. Vendor will be responsible for the proper and timely handling of any CPR-related communications submitted to the P.O. Box or via fax lines.

6. In the event a subsequent contract is awarded to a different vendor, arranging with the new vendor, upon completion of the contract period, the ownership of the post office box number, phone number, and dedicated fax lines for project operations. The contractor chosen as a result of this proposal will assure cooperation in the transfer to the new vendor.

## **B. Document Processing**

1. Requiring the hospitals, registrars, and CSEAs to submit paternity documentation utilizing a transmittal log (see **Appendices A1, A2 and A3—Sample Transmittal Log**, of the RFP). The log allows the entities to list the enclosed documents that are being forwarded to the CPR facility. The transmittal logs shall be cross checked by the CPR contractor with the attached paternity documentation to assure consistency. The vendor is required to contact the submitting facility if there is any problem with the attached information;
2. Processing original notarized affidavits, copies of administrative orders of paternity, certified court orders and rescission documents received from birthing facilities, local registrars, CSEAs, courts, and parents. The vendor will date-stamp affidavits, administrative orders of paternity, certified court orders, and rescissions on date of receipt. The vendor shall create a numbering process, which must be approved by ODJFS and ODH, to facilitate record identification. The vendor will also create a batch numbering system for batches of two-hundred records;
3. Reviewing affidavits, administrative orders of paternity, certified court orders, and rescission documents for validity in accordance with criteria provided by ODJFS. Invalid documents will be sent back to the point of origin with a letter of explanation. The vendor will track returned documents for correction and re-submission. Upon completion of work with all such documents, the vendor will provide them to ODH for comparison and permanent storage;
4. Creating and storing images of all affidavits and rescissions, excluding those that do not pass the review process at CPR. The imaged documents will be made available to the CSEAs and OCS staff through a password protected, secure portion of the vendor website required in this RFP within 48 hours of the numbering of the document by CPR. IP Authentication or restriction in order to access the secure Central Paternity Registry document site will be required. Images must be available through Internet Explorer or compatible with any internet browser ODJFS may use in the future. The vendor must use OnBase software. The vendor must develop multiple search criteria, including document number, mother's name, mother's social security number, mother's county of residence, father's name, father's social security number, child's name, child's date of birth, or a date range, so the CSEAs/OCS can access copies without delays. The estimated volume of imaged documents is 38,000-43,000 per year. For SFY 08, the current CPR contractor imaged 41,790 affidavits and 742 rescissions;

5. Entering the following information from each affidavit, administrative order, court entry, and rescission document into the database:
  - a. father's name, social security number, address, and date of birth;
  - b. mother's name (including maiden name), social security number, address, and date of birth;
  - c. child's name, social security number, address, date of birth, sex, and city, county and state of child's birth;
  - d. date document was received by CPR contractor;
  - e. date processed by CPR contractor;
  - f. origin of the document;
  - g. type of document; and
  - h. document number assigned by CPR contractor;
  1. NOTE: This data-entry function must be performed in the metropolitan Columbus, Ohio area. A statement affirming the vendor's compliance with this requirement must be included in vendors' proposals.
6. Correcting record errors identified by ODJFS and ODH;
7. Providing data entry of all affidavits and other records received within two working days of receipt, at an acceptable rate of accuracy of at least 99%. If the vendor determines a backlog has developed and the vendor cannot meet the two day working requirement, the vendor must alert ODJFS immediately, and include corrective measures to eliminate the backlog; and
8. Processing and providing appropriate follow-up to all letters of inquiry or other correspondence sent to CPR from the local registrars, hospitals, parents, or the general public. The vendor must date stamp these items, and respond to matters under its purview. Any correspondence requiring an OCS response must be forwarded to OCS within five days of receipt.

### C. Reporting

1. Producing a monthly report that indicates the number of affidavits received from each facility and the amount of time it took the facility to submit the completed documents to the CPR after the final signature was notarized. A sample of the existing report has been provided as **Appendix B—Sample Existing Affidavit Report** to this RFP. This report must be submitted as part of the comprehensive activity report specified in Deliverable C.2. (below) of this RFP;
2. Submitting two (2) hard copies and two (2) CD-ROMs of a monthly comprehensive activity report reflecting data by county, including totals of affidavits submitted by birthing facilities, registrars (hospitals and registrar data to be sorted by mother's county of residence), CSEAs, and parents. The activity report will also include the numbers of administrative orders, court orders, and rescission documents received from each county during the report month. Each summary report will contain monthly information as well as cumulative information for the calendar year. The activity reports must be sent to the ODJFS address as specified by the ODJFS Contract Manager;

3. Extracting data from the centralized paternity database and preparing customized reports at the request of ODJFS; and
4. Transmitting information electronically twice weekly to ODJFS and ODH that consists of all new records processed by the CPR contractor. The current preferred method of transmitting data to ODJFS is through FTP. ODH currently prefers transmissions be sent via e-mail (utilizing a zip file). ODJFS reserves the right to change the transmission requirements at any time.

**D. Training, Technical Assistance, & Community Education**

1. Maintaining the existing toll-free telephone number to receive inquiries regarding the document. The vendor will report to ODJFS monthly regarding the number of calls received on the toll-free number. The toll-free line will be operable from 8:00 a.m.-5:00 p.m. on work days (Monday through Friday), excluding state holidays; voice mail must be available 24-hours daily. The vendor will respond to all voice mail messages within 2 working days;
2. Developing and sending an introductory mailing to all 123 birthing facilities, 110 registrars, and 88 CSEAs. The introductory mailing will include basic information on the vendor's points of contact (including address, phone, fax, toll-free number and website). The vendor is responsible for the costs of the introductory mailing, including postage. ODJFS shall provide the selected vendor with the appropriate mailing list. The introductory mailing must be sent within 10 days of the purchase order being finalized, or later if deemed necessary by ODJFS;
3. Conducting site visits at each birthing facility at least annually (once per year) to monitor the processing of affidavits to ascertain use of correct procedures, and provide technical assistance as needed. Visits to local registrars will be required only when a problem becomes evident in the quality or number of documents received. The vendor's findings from the site visits will be included in the monthly report to ODJFS;
4. Developing and maintaining an Internet website which includes an overview of affidavit procedures and overall general information about paternity/rescission processes. The website will also clarify the role of ODH in birth record comparisons as required by law. The website must include a secure section that the CSEAs/OCS can access that will allow the CSEAs/OCS to view and print imaged affidavits/rescissions. These images are for agency use only. All document images produced during the course of the contract are property of ODJFS. Sufficient search criteria must be established to allow the CSEA to quickly locate the documents for viewing/printing. ODJFS has the right of final approval for the website content;
5. Producing an instructional DVD for use by the birthing facilities and registrars' offices. The DVD must cover the key points of state regulations and ODJFS rule for the completion and submission of paternity affidavits. The DVD must be of professional quality, produced in color, and designed as a stand alone training aid. The vendor must assume all responsibility for creation, production, copying and

- distribution of DVDs. ODJFS retains approval authority for final content. At least 350 copies will be required. The contractor will be responsible for mailing the DVDs to all birthing facilities during the effective term of the contract and any subsequent renewals that result from this RFP;
6. Producing a DVD 3-5 minutes in length for use by the general public (mothers, fathers, other family members) in birthing facilities. The content of the DVD will stress the importance of paternity establishment. The vendor is responsible for the creation of the DVD production and distribution of copies to all birthing facilities. ODJFS shall provide the selected vendor with the appropriate mailing lists. The initial supply will be 250 DVDs in English, and 75 in Spanish. ODJFS is investigating the need for other language versions (e.g., Somali). ODJFS has final approval rights for content;
  7. Creating a multi-color tri-fold brochure that explains the affidavit process. The brochure will highlight the benefits of paternity establishment. Initial and subsequent distribution of the brochures to birthing facilities, registrars, and CSEAs will be the vendor's responsibility. The brochure must be available within 120 days of the contract effective date. Approximately 50,000 brochures will be needed for the initial distribution. It is anticipated that 50,000 brochures will be needed for each contract year resulting from this RFP (Important – see NOTE below); and
  8. Conducting regional training meetings for the hospitals, registrars and CSEAs annually. The sessions are to be held in three to four locations across the state. The selected vendor shall select the location of each of the three to four regional training meetings but must be approved by ODJFS prior to training sessions. Each session shall run approximately 4-5 hours in length. Topics will include general affidavit procedures, and resolutions for frequent issues that hospital and registrar staff regularly encounter (married mothers, minors, delayed signatures, etc.).
  9. Conducting training sessions for various judicial bodies up to four times a year. These training sessions may be provided at conferences, specially scheduled meetings, or videoconferences. Locations for training sessions may vary throughout the state and must be approved by ODJFS in advance. Dates and times for the training sessions will be determined cooperatively by the vendor and ODJFS, with final approval by ODJFS. Topics will include general affidavit procedures, review of forms used in the process, and ways to avoid common errors that are observed by the CPR staff.

**NOTE:** All instructional materials to be produced under this contract are subject to approval by ODJFS. Excluding project correspondence, the introductory mailing announcing the contractor's contact points (see Section 3.4, D. 2) and reports, and excluding a reasonable number of copies of instructional materials for distribution to ODJFS for clearance purposes, the printing of project materials are subject to State of Ohio regulations. **Vendors, therefore, are not to include costs of printing documents in their cost proposals.** The selected vendor will be required to provide finalized, approved documents in print-ready condition to ODJFS, reasonably in advance of any scheduled distribution and dissemination of materials, to allow for printing time. Reproduction of

printed materials will be completed under other existing ODJFS or State of Ohio agreements for printing services.

Also, any and all instructional materials produced by the selected vendor under terms of the contract resulting from this RFP shall be the sole property of ODJFS.

## **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) Web Site 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:

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

**AND**

- in a sealed, separate envelope, **five (5) paper copies (one signed original and four (4) 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 March 17, 2009** 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 original 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 CENTRALIZED PATERNITY REGISTRY (CPR) SERVICES, RFP#: R-89-09-8009 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 B**. 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, 1 through 5)

**Sub-Tab 2b.** Organizational Experience & Capabilities (Section 2.2, 1 through 8)

**Sub-Tab 2c.** Staff Experience and Capabilities (Section 2.3, 1 through 4)

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

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

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

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

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

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

**Tab 5** Vendor Attachments or Appendices

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 G.**), 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 required 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 G.** 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 a central Ohio location (as described in RFP Section 3.1, Scope of Work), the vendor must demonstrate in this Tab 1 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 central Ohio location, a description of the work to be performed at that location, and the number of its personnel to operate from the central Ohio location. If the location is planned but not yet operational, an estimated implementation schedule is to 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 3.4, Specifications of Deliverables, of this RFP. The responses must address each element separately. Vendors should place their responses for each Deliverable identified in Section 3.4 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 3.3, Administrative Structures—Proposed Work Plan of this RFP.

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

This section should, at a minimum, include excerpts/samples of work products described in RFP Section 2.2.

**C. Cost Proposal**

**Five** (one (1) signed original and four (4) copies) copies of the Cost Proposal must be submitted in a separate, sealed envelope, and labeled: **“NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR CENTRAL PATERNITY REGISTRY SERVICES, RFP#: R-89-09-8009 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.

Vendors are to complete the Cost Proposal Form, provided as **Attachment C.** to this RFP according to instructions, sign it, and submit it fully completed as the separate sealed cost proposal. The Cost Proposal Form requires interested vendors to provide a group of individual prices for those services defined in Section 3.4 Specifications of Deliverables. Vendors are to use their professional comprehension of the effort required to perform those services and to offer to ODJFS its flat, all-inclusive fee for performing each. The prices offered in the vendor's Cost Proposal will be the prices in effect throughout the contract period, including any renewal contracts, as described in Section 1.10, Time Frames & Funding Source, of this RFP.

Vendors are to use the format in **Attachment C, Cost Proposal Form**, to submit their cost proposal for SFYs 08, 09 (etc.) At the vendor's discretion, additional documentation may also be included with the completed **Attachment C.**, 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 3.4 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.
- Any sensitive personal information on vendor *or* sub-contract staff (e.g., social security numbers, addresses) must be omitted from vendor proposals, or rendered fully unreadable, or ODJFS may at its option disqualify the vendor from any consideration.

**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 CENTRALIZED PATERNITY REGISTRY (CPR) SERVICES FOR RFP#: R-89-09-8009 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. (Any other RFP-specific mandatory requirements?) YES - Section 2.1, #1 & 2

**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 **1040 points** will be awarded for the Technical Proposal. A technical proposal must achieve a total of at least **813 points** (a score which represents that the vendor can successfully perform the resulting contractual duties) out of the possible **1040**

**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 eight (8<sup>th</sup>) calendar day after the issuance of formal letters sent to all responding applicants regarding the State's intent to make the awards. The date on these ODJFS letters to responding applicants is the date used to determine if a protest regarding the intent to award is submitted by the end of the protest period.
  
- 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.
- 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.*)

## **SECTION IX. APPENDICES AND THEIR USES**

- A. **Sample Transmittal Log (Sec. 3.4, B., 2.) (For vendor reference purposes)**
  - 1. **CSEA Transmittal Log**
  - 2. **Hospital Transmittal Log**
  - 3. **Local Registrar Transmittal Log**
- B. **Sample Existing Affidavit Report (Sec. 3.4, C., 1.) (For vendor reference purposes)**

Thank you for your interest in this project.