

**Lucas County Workforce Development Agency
By the Authority of the
Lucas County Board of Commissioners**

**REQUEST FOR PROPOSALS
(48-13-RFP/WDA-01)**

**For the selection of
One-Stop Operator Services
Including Core Services
State Fiscal Years 2013-2014**

Issued by:

**Lucas County Workforce Development Agency (LCWDA)
1301 Monroe Street
Toledo, Ohio 43604**

Release Date: March 20, 2012

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Section 1. General Information

This is a Request for Proposals (RFP) under Section 307 of the Ohio Revised Code (“ORC”) and Section 5101:9-4-07 of the Ohio Administrative Code (“OAC”). Lucas County Workforce Development Agency (“LCWDA”), through the Lucas County Board of Commissioners (“Board”), is seeking Proposals from interested parties possessing the expertise and capacity to serve as the One-Stop Operator for the Workforce Investment Board of Lucas County (WIB) as approved by the Board of Lucas County Commissioners (Commissioners). Proposal submissions for the single lead agency will be for the operation of the One-Stop at existing site, 1301 Monroe Street, Toledo, Ohio 43604 known as “The Source”. Satellite locations may be selected, if a need is determined, through the proposals received as a part of this process.

The RFP gives an approximate timeline for the various events in the submission process, the evaluation process, and performance of the services. While the dates are subject to change, Bidders must be prepared to meet the deadlines as specified in this RFP.

Any failure to meet the deadlines in the submission, evaluation and/or negotiation phase or objection to the dates of performance may result in LCWDA refusing to accept a Bidder’s proposal.

Bidder Project Requirements:

All Bidders of services specified in this RFP must:

- Have a history of providing the services specified in this RFP and in the submitted proposal.
- Demonstrate an in-depth understanding of how to provide these services effectively with the designated target population.
- Have the organizational capacity to provide the proposed services.
- Have the necessary skills to develop and utilize a method to track program results and specific outcomes.

Allocation and Target Population:

LCWDA has projected \$450,000 in Workforce Investment Act Title I funds for both State Fiscal Year 2013 and 2014 for the purchase of services requested through this RFP; this amount is subject to final allocations. The bidder selected will provide services to ensure the vision of the One-Stop system is implemented with seamless service delivery across programs and agencies as described in the Workforce Investment Act of 1998 (“WIA”). Recognizing the ongoing changes in the nature of employment and the workplace, WIA places an emphasis on workforce development.

Project Deliverables & Work Schedule:

Bidders are required to provide performance measures that clearly delineate the number of people to be served and program specific goals and measurable client outcomes. Should the Bidder be awarded a contract, all outcome measure targets will be negotiated, based upon the measures specified in the successful Bidder’s proposal, and included in the contract language developed with LCWDA staff. The selected service contract must be cost effective and utilize service strategies that are based upon current research and that respond to the specific service needs of the populations to be served.

Any interested Bidder must submit a completed proposal following the procedure outlined in this Request for Proposal no later than April 6, 2011 at 4:00 P.M. (local time).

If a suitable proposal made in response to this RFP is selected, LCWDA, through the Board, may enter into a contract with a Bidder whose proposal has been chosen (“Selected Bidder”). The RFP provides details on what is required to submit a proposal, how LCWDA will evaluate the proposal, and what will be required of the Selected Bidder in performing the work.

1.1 Time Table

The following timetable shall apply to this RFP, subject to the contract awarded under this RFP (“Contract”) being finalized and approved by the Board.

RFP (48-13-RFP/WDA-01) Release Date	March 20, 2012
Deadline for Electronic Bidder Q&A Submittal	March 26, 2012, 12:00 p.m.

Deadline for Posted Responses to Q&A	March 28, 2012
Deadline for Submitting Proposals	April 6, 2012 at 4:00 P.M. (local time)
Project Implementation	Approximately July 1, 2012 through June 30, 2013

LCWDA reserves the right to revise this schedule in the best interest of the process after providing reasonable notice which will be posted at <http://www.co.lucas.oh.us/Bids.aspx> .

1.2 Contact Person

On Behalf of the Lucas County Workforce Development Agency:

Michelle Niedermier

Lucas County Department of Job & Family Services

3210 Monroe Street, P.O. Box 10007

Toledo Ohio 43699-0007

Email: niedem@odjfs.state.oh.us

1.3 Electronic Bidder's Conference

Any prospective Bidder desiring an explanation or interpretation of the RFP or specifications must request it via e-mail as stated in Section 1.4 by 12:00 p.m. March 26, 2012. While participation in the Bidders Q&A session is not mandatory, it is recommended that Bidders utilize this opportunity to ask any questions they may have related to the RFP. All questions submitted during the prescribed timeframe will be published with the corresponding answers at <http://www.co.lucas.oh.us/Bids.aspx>.

1.4 Written Questions

Questions must be submitted in writing and received via email, by Michelle Niedermier at niedem@odjfs.state.oh.us by March 26, 2012 at 12:00 p.m. These questions will be posted on the Lucas County website at <http://www.co.lucas.oh.us/Bids.aspx> on March 28, 2012 as stated above. From the issuance date of the RFP, until a contract is in effect, there may be no communications concerning the RFP between any interested bidder and any employee of LCWDA or any other individual regardless of their employment status, who is in any way involved in the development of the RFP or the selection process. The only exceptions to this prohibition are as follows:

- A. As necessary in the case of any pre-existing business relationship between LCWDA and a bidder which could potentially respond to this RFP, in order to conduct that business;
- B. As part of an interview necessary for LCWDA to make a selection decision;

Bidders who attempt any communication prohibited by this Section may be disqualified. LCWDA 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.

IMPORTANT: Requests from potential bidders for copies of previous RFP's, past bids, score sheets or contracts for this or similar past projects, are public records requests and are not clarification questions regarding the present RFP. Public record requests submitted in accordance with County policy will be honored. The posted time frames for LCWDA responses to emailed questions for RFP clarification do not apply to public records requests.

Requirements under a current project may or may not be required by LCWDA under any future contract, and so may not be useful information for bidders who choose to respond to the RFP. Therefore, bidders 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 and, if applicable, in the Q&A document, NOT on details of a current or past related contract. If bidders ask questions about existing or past contracts using the Internet Q&A process, LCWDA will use its discretion in deciding whether to provide answers.

LCWDA will only answer those questions submitted within the established time period for the Electronic Q&A process (see Section 1.3), and which pertain to issues of RFP clarity, and which are not requests for public records. LCWDA is under no obligation to acknowledge questions submitted through the Q&A process if those questions are not in accordance with these instructions.

1.5 Bidder Disclosures

Bidder must disclose any and all current, pending or threatened court actions and/or claims against the Bidder. This information may not cause rejection of the proposal but withholding the information may give cause to reject the proposal.

1.6 Conflict of Interest

No Bidder will promise, or give to a LCWDA employee anything of value that could influence that employee's decision on awarding a contract. No Bidder shall attempt to influence an employee of LCWDA to violate the procurement policies of LCWDA, the ORC, OAC or Federal Procurement Regulations. In addition, Bidder acknowledges and agrees to abide by established ethical standards, which became effective November, 2011. A copy of the ethics code is available at <http://www.ethics.ohio.gov/ethicslawrevisedcode.pdf>.

1.7 Bidder Examination of the RFP

Bidders are expected to be familiar with the entire RFP. Bidders are expected to respond to the RFP in a manner that makes it clear they understand and have responded to all sections of the RFP. If Bidders discover any mistakes in the RFP, they must notify the Contact Person in writing (an email attachment on organizational letterhead is acceptable).

1.8 Ability to Award Contract

This RFP and all LCWDA contracts are contingent upon the availability of funds. If at any time during the RFP process funds are not available for the proposed services, the RFP process will be canceled. In such an event, the Bidders will be notified at the earliest possible time. LCWDA shall not compensate the Bidders for any expenses incurred as a result of the RFP process.

1.9 Insurance Requirements

If RFP specifications require the performance of labor for LCWDA, a Selected Bidder must agree to indemnify and protect LCWDA and the Board against all liabilities, claims, or demands for injuries or damages to any person or property growing out of the performance of the Contract, by the Selected Bidder/Contractor, its servants, employees, agents and/or representatives. Prior to the issuance of the Contract, the Selected Bidder must furnish an Insurance Carrier's Certificate showing that the Selected Bidder has adequate Worker's Compensation, public liability, and property damage insurance coverage.

1.10 Taxes

LCWDA does not pay local, state or Federal taxes. If requested and applicable to the services rendered via the contract, the Selected Bidder(s) will be furnished with an exemption certificate.

1.11 Compliance with the Law

A Selected Bidder who has entered into a contract with LCWDA must agree to comply with all applicable Federal, State, and local laws in the conduct of the work specified in this RFP including applicable state and federal laws regarding drug-free work places. The Selected Bidder will be required to accept full responsibility for payment of all taxes and insurance premiums including, but not limited to; Unemployment Compensation insurance premiums, Workers' Compensation, all income tax deductions, Social Security Deductions, and any other tax or payroll deductions required for all employees engaged by the Selected Bidder in the performance of the work specified in this RFP.

Both for-profit and not-for-profit Contractors are required to comply with federal rules as specified in Office of Management and Budget (OMB) Circular A-133 audit requirements. Contractors that expend \$500,000 or more in a year in Federal awards shall have a single or program-specific audit conducted for that year. Contractors that expend less than \$500,000 a year in Federal awards are exempt from Federal audit requirements for that year but records must be available for review or audit by appropriate officials and auditors of the federal agency, the pass-through entity, and the General Accounting Office (GAO). Any biennial (two year) audit shall cover both years within the biennial period in the scope of the audit.

A Contractor is required to follow all federal, state and local procurement rules regarding the purchase of equipment, sub-contracting and program materials, including making efforts to utilize small and minority-owned businesses, women's business enterprises and labor surplus area firms when they are potential resources for supplies, equipment and services. LCWDA will provide training to the Selected Bidder Provider(s) for One-Stop Services

regarding such rules if requested. Funds distributed through this RFP are Workforce Investment Act Title I funds. Procurement rules for this funding source must be adhered to.

ORC Section 9.24 prohibits LCWDA from awarding a contract to any Bidder against whom the Auditor of State has issued a finding of recovery if the finding of recovery is “unresolved” at the time of award. By submitting a proposal, Bidder warrants that it is not now, nor will it become, subject to an “unresolved” finding for recovery under ORC Section 9.24, prior to the award of the Contract, without notifying LCWDA of such findings. See Section 7 Affidavits, “No Findings for Recovery Affidavit”.

Any proposal or other material submitted by a Bidder becomes the property of LCWDA and may be returned only at LCWDA’s option. Proprietary information should not be included in a proposal or supporting materials because LCWDA will have the right to use any materials or ideas submitted in a proposal without compensation to the Bidder. Additionally, all proposals are open to the public after a Bidder’s proposal is selected.

LCWDA will retain all proposals, or a copy of such, as part of the Contract file for at least three (3) years from the date the Contract has been awarded. After the retention period, LCWDA may destroy or otherwise dispose of the proposal and/or any copies.

LCWDA may disclose to the Selected Bidder written or other information that it treats as confidential. All such confidential information and all related material and documents LCWDA delivers to the Selected Bidder remain with the property of LCWDA. The Selected Bidder must treat such information as confidential if it is so marked, otherwise identified as such, or when by its very nature, it deals with matters, if generally known, would be damaging to the best interests of the public, contractor, other contractors, or potential contractors with LCWDA, or individuals or organizations with whom LCWDA keeps information. For example, information should be treated as confidential if it includes proprietary documentation, materials, flow charts, codes, software, computer information, techniques, models, diagrams, know-how, trade secrets, data, business records or marketing information. By further example, the Selected Bidder must also treat as confidential information any material, to which attorney-client, physician-patient, or other privilege recognized by law may apply, and any documents or records expressly excluded by Ohio law from public records disclosure requirements.

Additionally, LCWDA (and by extension, Contractor) is required to follow the following federal procurement policies, specifically the following:

- Compliance with the Copeland “Anti-Kickback” Act (18 U.S.C. 874) as supplemented in Department of Labor regulations (29 C.F.R. Part 3).
- Compliance with the Davis-Bacon Act (40 U.S.C. 276a to 276a-7) as supplemented by Department of Labor regulations (29 C.F.R. Part 5).
- Compliance with Sections 103 and 107 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-330) as supplemented by Department of Labor regulations (29 C.F.R. Part 5).
- Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857 (h)) section 508 of the Clean Water act (33 U.S.C. 1368), Executive Order 11738, and environmental protection agency regulations (40 C.F.R. part 15).
- Mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).
- Mandatory disclosure to LCWDA of any modifications to names, addresses, phone numbers, facsimiles, email, etc. when such occurs during the duration of this Contract.

1.12 Equal Opportunity Provisions Required

All Bidders must be willing to enter a Contract containing the following express language contained in ORC Section 125.111:

Every contract for or on behalf of the state or any of its political subdivisions for the purchase of materials, equipment, supplies, contracts of insurance, or services shall contain provisions similar to those required by Section 153.59 of the Revised Code in the case of construction contracts by which the contractor agrees to both of the following:

That in the hiring of employees for the performance of work under the contract or any subcontract, no contractor or subcontractor shall, by reasons of race, color, religion, sex, age, handicap, national origin or ancestry, discriminate against any citizen of this state in the employment of a person qualified and available to perform the work to which the contract relates.

That no contractor, subcontractor, or any person acting on behalf of any contractor or subcontractor shall comment in any manner, discriminate against, intimidate, or retaliate against any employee hired for the performance of work under the contract on account of race, color, religion, sex, age, handicap, national origin or ancestry.

A Contractor who contracts with the state or any of its political subdivisions for materials, equipment, supplies, contracts of insurance, or services shall have a written affirmative action program for the employment and effective utilization of economically disadvantaged persons, as defined in ORC Section 122.71. Annually, each such Contractor shall file a description of the affirmative action program and a progress report on its implementation with the Ohio Civil Rights Commission and the Minority Business Development Office established under ORC Section 122.92. In addition, all Contractors who contract with the state or any of its political subdivisions for materials, equipment, supplies, and services must also adhere to requirements which address the utilization of small and minority-owned businesses, women's business enterprises and labor surplus area firms.

1.13 Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Organization (DMA)

ORC Section 2909.33 ("Terrorism") requires that any contract that will result in a Bidder receiving funding in an aggregate amount greater than \$100,000 annually shall certify that it does not provide material assistance to any organization on the United States Department of State Terrorist Exclusion List. By the Bidder completing the DMA form and affixing a signature on the form (Declaration Requiring Material Assistance/Non-assistance to a Terrorist Organization) of the RFP, the Bidder certifies that it does not provide material assistance to any organization on the list, and that failure to complete the form or answer 'yes' to any question shall serve for purposes of this affidavit as a disclosure of the provision of material assistance to an organization that is listed on the Terrorist Exclusion List (attached with DMA form).

Section 2. Submitting Proposals

2.1 Preparation of Proposal

A proposal must clearly identify the Bidder's qualifications to provide the services requested in this RFP. Bidder must respond to the specific services requested through this RFP and its instructions and requirements. A Bidder's proposal must include all costs that relate to the proposed services to be provided. All proposals become the property of LCWDA and will be considered public information available for inspection following the selection of a proposal.

Sensitive Personal Information: It is the responsibility of the bidder submitting a bid to remove all personal confidential information (such as home addresses and social security numbers) of bidder's staff and/or of any subcontractor and subcontractor staff from resumes or any other part of the bid package if desired. Following submission to LCWDA, all bids submitted become part of the public record.

2.2 Proposal Cost

The Bidder is fully responsible for all costs associated with the development and submission of the proposal. LCWDA assumes no contractual or financial obligation as a result of the issuance of this RFP, the preparation and submission of the proposal by a Bidder, the evaluation of an accepted proposal, or the selection of an approved proposal.

2.3 False or Misleading Statements

Proposals containing false or misleading statements may be rejected.

2.4 Bidder Representative's Signature

The Cover Page of the proposal must be signed by an individual who is authorized to contractually bind the Bidder. The signature must indicate the title or position the individual holds in the Bidder's organization. **Unsigned Proposals will not be accepted.**

2.5 Delivery of Proposals

Organizations who are interested in submitting bids must make their submission no later than **4:00 p.m. Eastern (local) Time on April 6, 2012**. We respectfully ask that you respond to this request with a service description packet (as provided by LCWDA) outlining how your organization meets the criteria as listed, and why you believe your organization would be successful in accomplishing the tasks as indicated above. All responses must be sent, via e-mail to: Michelle Niedermier at niedem@odjfs.state.oh.us. Bids submitted by any other method will be rejected. **LCWDA is not responsible for any bids delivered by any other means, or to any address other than the one provided above.**

All submissions must be received via email by the above date and time. Materials received after the submission deadline date will not be added to previous submissions, nor be considered. No confirmations of bids received can be provided. Submission of a bid indicates acceptance by the organization of the conditions contained in this RFP, unless clearly and specifically noted in the bid submitted.

A Bidder should carefully review their final proposal. Once submitted, a Bidder cannot make any change in the proposal unless otherwise permitted under this RFP or by LCWDA. Notwithstanding the foregoing, LCWDA may request additional information for clarification purposes only.

2.6 Acceptance & Rejection of Proposals

LCWDA reserves the right to reject any or all proposals. The selection of a proposal by the LCWDA shall be final upon approval by the Board. LCWDA is under no obligation to enter into a Contract with any organization as a result of this solicitation, if, in the opinion of LCWDA, none of the bids are responsive to the objectives and needs of the Agency. LCWDA reserves the right to not select any organization should LCWDA decide not to proceed with the services as outlined. Changes to this RFP of a material nature will be provided on the Lucas County website <http://www.co.lucas.oh.us/Bids.aspx>. All bidders are responsible for obtaining any such changes without further notice by LCWDA.

2.7 Evaluation & Award of Contract

Bidders should not assume that the review team members are familiar with any current or past work bidder may have completed with LCWDA. Bids containing assumptions, lack of sufficient detail, poor organization and/or lack of proofreading will be evaluated accordingly. Review Committee members are required to sign disclosure forms to establish that they have no personal or financial interest in the outcome of the bid review and selection process.

The review process will be conducted in three (3) parts:

1. **Preliminary Proposal Review** examines the proposal to ensure it meets the minimum requirements and mandatory conditions specified in the RFP. If it does not, it will be rejected. A proposal must meet the following mandatory conditions and requirements:
 - ✓ The proposal must have been received via email at the address indicated in the RFP **by 4:00 p.m. (local time), April 6, 2012. A proposal not received by the specified date and time at the email address as stated, will be rejected.**
 - ✓ The cover page of the proposal must be signed by an authorized representative of the Bidder who is expressly authorized to obligate the organization to a contractual agreement.
2. **Review Committee Process**
 - ✓ All proposals meeting the requirements of Section 2.7(1) above will be reviewed, evaluated and rated by a Review Committee that may be composed of LCWDA staff, specialists in the RFP program area and other community representatives. The Review Committee will not include Bidders

to this RFP or anyone else who may have any conflict of interest that would prohibit a fair and equitable review process.

- ✓ The Review Committee will evaluate each proposal against the criteria specified in the RFP. During the evaluation, the Review Committee may request additional information from the Bidder. Failure to respond to such requests for information will result in the Bidder's proposal being reviewed as submitted. Such information requests and Bidder's responses must always be in writing.
- ✓ Proposal submission must meet format specifications as stated in this RFP, including maximum number of pages for the service description forms, font and line spacing specifications, and completion and inclusion of the cover page and required attachments. Evaluation Points will be lost if these requirements are not met.
- ✓ The Review Committee shall review all qualified proposals. A standard Proposal Evaluation Rating Sheet (see following page) will be used. The range of evaluation points and the evaluation criteria for each required section of the proposal is detailed in the Rating Sheet.

Proposal Evaluation Rating Sheet

Maximum Points	High	Moderately High	Average	Below Average	Poor	Unacceptable
5 points	5	4	3	2	1	0
Application Format						
<i>Cover page signed, format specifications met for the entire packet, and documents named appropriately.</i>						
20 points	20-18	17-14	13-11	10-7	6-4	3-0
Service Summary						
<i>Summary of the proposed services, activities, goals, collaborating activities (if applicable) and strategies for meeting LCWDA desired results (not to exceed one page)</i>						
25 points	25-22	21-17	16-12	11-8	7-4	3-0
Organizational Capacity						
<ul style="list-style-type: none"> • Suitable administrative, accounting and management information systems in place • Sufficient staff in place with experience working with this population • Adequate policies and procedures in place • A demonstrated ability to work with all relevant agencies and other organizations in meaningful collaborative and/or partnership manner • Not to exceed two pages 						
40 points	40-34	33-27	26-20	19-13	12-6	5-0
Successful Experience with Proposed Services and Target Population						
<ul style="list-style-type: none"> • Description of the organization's experience in providing proposed services to the target population • Description of the organization's record of program participants' successful attainment of related goals • Detailed report of goals or targets in comparison to actual outputs or outcomes for past experience in this service area; include statistical results to support this information. • Not to exceed three pages 						
40 points	40-34	33-27	26-20	19-13	12-6	5-0
Program Description and Service Delivery						
<ul style="list-style-type: none"> • A proposed program and service delivery model that responds to the areas described in this RFP • A clear identification of the key components of the service delivery model and description of the specific strategies employed to achieve the intended results • A detailed description of the established relationships with any specified referral sources and how service linkage and follow-up will occur • A timetable of operations • Demonstration of prior successful performance in this service area • Not to exceed four pages 						
20 points	20-18	17-14	13-11	10-7	6-4	3-0
Internal Evaluation and Accountability						
<ul style="list-style-type: none"> • Bidder should be able to demonstrate the ability to document, track, analyze data, and submit required reports to LCWDA • Meaningful benchmarks, performance measures, and outcomes should be identified • The stated rationales for targeting these performance measures should be sound • The organization should be able to demonstrate the ability to document, track and analyze participant progress and have the systems in place to accomplish this • The organization should have the tools and methods in place to measure client satisfaction • Not to exceed two pages 						

The Review Committee may consider information from sources other than the written proposal to evaluate the Bidder's administrative abilities. "Other" sources of information may include, but are not limited to, written responses to any clarifying questions posed by the Review Committee, Bidder's experience in administering similar services, and any monitoring data regarding Bidder's performance of current or prior contracts with LCWDA.

The final composite Review Committee Evaluation Rating Sheet, which includes the Bidder's prioritized ranking, will be maintained on file by LCWDA. The end result of the review process is a prioritized list of applications in descending order from highest scoring to lowest scoring proposals.

2. **Administrative Review** - Following the detailed scoring by the Review Committee, the results will be evaluated by LCWDA administration in order to ensure that all facets related to predicted performance were considered. In selecting the successful proposal, the LCWDA administrative evaluation will take into consideration the following, but will not be limited to:
- ✓ Criteria used in the Review Committee's review process;
 - ✓ Strength and stability of the Bidder to provide the requested services;
 - ✓ Ability to meet the project/program timelines;
 - ✓ Overall responsiveness and completeness of the Proposal as well as the likelihood that, in the opinion of LCWDA and at the sole discretion of LCWDA, the Proposal best meets or exceeds LCWDA expectations;
 - ✓ Scope of services being proposed;
 - ✓ Collaboration letters;
 - ✓ Any other factors considered relevant by LCWDA and demonstrated by the Proposal or investigation by LCWDA;
 - ✓ Budget analysis, including diversity of Bidder's funding sources, reasonableness and cost effectiveness of proposed services;
 - ✓ Any other factors considered relevant by LCWDA, including performance on prior and current contracts with LCWDA, and demonstrated by the bid proposal or investigation by LCWDA; and
 - ✓ Experience with a similar project/program of comparable size and scope, including any available information regarding program results. LCWDA statistics from prior contracts will be included in the administrative review process when applicable.

In addition, Bidders may be requested to present a summary of their proposal to the Workforce Investment Board (WIB) at their meeting scheduled for April 26, 2012 at 8 am. This presentation will be informational only; no scoring process will be assigned to such presentations.

Any Bidder whose proposal was not selected ("Unsuccessful Bidder") will be notified of their non-selection immediately after the Selected Bidder(s) is (are) notified. If a Selected Bidder fails to execute a Contract within the Contract development period, LCWDA may, at its sole discretion, award the Contract to another Bidder whose proposal met the requirements of the RFP and addenda. The period of time within which such an award of the Contract may be made shall be subject to the written agreement between LCWDA and the new Selected Bidder.

2.8 Post Selection Meeting

If an Unsuccessful Bidder wishes to discuss the selection process, a request for an informal meeting with LCWDA and the explanation for it must be in writing to be received by LCWDA within seven (7) working days from the mailing date of the notification of non-selection. The request shall state the reason(s) for the meeting, citing the law, rule, regulation or RFP procedure(s) on which the request is based. All requests must be signed by an individual authorized to represent the Bidder and must be addressed to the Contact Person described in Section 1.2, hereof.

2.9 Caveat

Proposal selection does not guarantee that a contract for services will be awarded. All proposals will be evaluated based on the criteria in the RFP (see the Rating Sheet under Section 2.7, hereof). LCWDA will work with the Selected Bidder to finalize the details of the Contract document. **If LCWDA, in its sole discretion, determines that LCWDA and the Selected Bidder are unable to successfully come to terms regarding the Contract within a reasonable time period, LCWDA reserves the right to terminate discussions. If this happens, LCWDA, in its sole discretion, reserves the right to either 1.**

select another Bidder from the bid process with whom to negotiate the Contract, 2. cancel the RFP, or 3. reissue the RFP.

2.10 Termination for Convenience

LCWDA reserves the right to terminate the resulting Contract at its convenience during the Contract Period or any subsequent renewal period by giving the Contractor thirty (30) days written notice. Such terminations shall be subject to Board approval.

2.11 Termination for Default/Suspension of Referrals

LCWDA shall terminate the Contract should a Contractor fail to carry out the terms and conditions of the Contract after issuance of a notice of required improvement (“cure notice”) authorized by a resolution of the Board. LCWDA may also suspend referrals and/or payment to a Contractor pending the outcome of any investigations alleging breach of contract. A Contractor will have thirty (30) calendar days after the date of a cure notice to develop and submit to LCWDA a Corrective Action Plan (“CAP”) that adequately addresses issues identified in the cure notice. Following the CAP’s approval by LCWDA, a Contractor will have sixty (60) calendar days or other mutually-agreed upon timeframe, within which to implement the CAP and make any necessary corrections. If, after such notice, a Contractor fails to remedy the conditions, LCWDA will issue an order to stop work immediately and terminate the Contract without obligation.

2.12 Complaint Process

LCWDA clients and bidder staff connected to LCWDA activity shall have the right to use the complaint procedures outlined by the Ohio Department of Job & Family Services and the U.S. Department of Labor Civil Right Center (“CRC”) for resolution of any dispute relating to a LCWDA program which involves discrimination on the basis of race, color, gender, national origin, religion, political affiliation or belief, or status as a LCWDA participant.

The successful bidder shall cooperate in the investigation and resolution of any complaint to which it is a party, and shall abide by the terms of any resolution or decision made under the procedures.

2.13 Conducting Business Involving Relatives

No relative by blood, adoption, or marriage, which shall include: spouse, significant other, child (including adult children), parent, sibling, sibling’s spouse, aunt, uncle, niece, nephew, stepparent and stepchild (including adult stepchildren), of any executive or employee of the successful bidder shall receive favorable treatment from the successful bidder for enrollment into, or employment related to, the LCWDA activity. The successful bidder shall also avoid entering into any subcontract or agreement to provide programs or services related to the LCWDA activity with an executive’s or employee’s relative by blood, adoption or marriage. When it is in the public’s interest for the organization to provide a service related to the LCWDA activity with a relative, the successful bidder shall obtain written approval from LCWDA before entering into an agreement. All correspondence shall be kept on file and available for monitoring and audit reviews.

2.14 Nepotism

No individual may be placed in any LCWDA activity if a member of that person’s immediate family is directly supervised by, or directly supervises, that individual.

2.15 Political and Sectarian Activities

No sectarian (i.e., religious) or political activities may be conducted in connection with LCWDA activity. Participants shall not be employed through LCWDA contracts to carry out the construction, operation, or maintenance of any part of any facility that is used or is to be used for sectarian instruction or as a place for religious worship, except that maintenance of a facility is allowed if it is not primarily or inherently devoted to sectarian instruction or religious worship, (i.e., where the person or entity operating the facility is part of a program or activity providing services to participants).

Section 3. Terms and Conditions

If a Contract ensues, the RFP and the commitments made in the selected proposal will become contractual obligations, including any information requested during Contract development by LCWDA. Failure of the Selected Bidder to accept these obligations may result in cancellation of the award.

3.1 Type of Contract; Subcontracting

The Contract will incorporate the requirements of the RFP, the Selected Bidder's proposal, and all other agreements that may be reached during Contract negotiation.

The Contractor is responsible for the execution of the project/program and Contract requirements. If the Contractor chooses to provide services via sub-contractor(s), the Contractor is fully responsible for all sub-contractor(s) delivery of service and payment thereof. The Contractor will not subcontract or assign the Contract nor shall any subcontractor commence performance of any part of the work included in the resulting Contract, without the previous written consent of LCWDA. Acceptance or rejection of a proposed subcontract is at the sole discretion of LCWDA. Proper procurement rules must be adhered to when obtaining a subcontractor.

3.2 Contract Period, Funding & Invoicing

The term of the Contract shall be for an approximate twelve (12) month period, commencing no sooner than July 1, 2012, and ending no later than June 30, 2013. Subject to the availability of funds and at the sole discretion of LCWDA (with the approval of the Board), a Contract may be renewed for up to one additional twelve (12) month period. Any such Contract renewal will be based on Contractor's performance as determined solely by LCWDA.

A Contractor can claim payment only for services already provided and must submit invoices for payment on a monthly basis. Invoices must be submitted within thirty (30) days of the last day of the month of service delivery **(for example, invoices for services delivered in the month of August must be presented to LCWDA no later than the immediately following September 30.) Generally, reimbursement by LCWDA is made within thirty (30) days of receipt of an invoice for actual expenses.** Funds designated for the Contract Period are subject to funding requirements under WIA Title I funding allocations.

A Contractor may neither perform work nor submit an invoice for payment for work performed for this project for any time period prior to contract approval by all applicable parties. This includes any costs associated with proposal development.

3.3 Confidentiality & Security

A Selected Bidder/Contractor who has access to confidential information will be required to keep that information confidential. The Selected Bidder/Contractor must agree to comply with all Federal and State laws applicable to LCWDA and/or clients of LCWDA concerning confidentiality of LCWDA clients. Any use or disclosure of information concerning LCWDA clients for any purpose not directly related to the administration of the Contract is prohibited. If a Contractor subcontract(s), the subcontractor shall also be subject to the foregoing confidentiality requirements and shall be required to agree to said confidentiality requirements in writing whether under a contract with the Contractor or in a separate document.

3.4 Duplicate Billing

A Contractor shall warrant that claims made to LCWDA for payment shall be the actual cost for authorized services rendered to eligible individuals and such claims shall not be made against other funding sources for the same services. Use of funds awarded through any contract with LCWDA by the Contractor to supplant any other existing funding sources is strictly prohibited.

3.5 Additional Contract Information

- **Contractors will be subject to announced and unannounced monitoring by LCWDA which is totally independent and distinct from the audit requirements described in Section 1.11, hereof. LCWDA will also conduct a contract Risk Assessment in accordance with the Ohio Department of Job and Family Services ("ODJFS") procurement rules.**
- LCWDA reimburses for services predominantly on a cost reimbursement basis. All invoices for services must be submitted monthly to LCWDA (see Section 3.2, hereof). All amounts on the invoice are to be supported by documentation, as required by LCWDA, attached to the invoice. All documentation for

actual expenses of those services must be retained by the Contractor for three (3) years or until the completion of an audit. There are no exceptions to this requirement.

- LCWDA will only reimburse for the agreed upon rates and/or costs incurred under the terms of the Contract.
- Payment of invoices will be contingent upon the Contractor's use of mandated LCWDA reporting mechanisms.
- Project deliverables must be clearly defined in the Contract and progress will be monitored throughout the duration of the Contract.
- Should future funding be available, Contract renewal will be based upon performance, compliance with all Contract terms, requirements of any future RFP(s) and continued local need, as determined solely by LCWDA.
- **LCWDA reserves the right to extend and/or amend the Contract based on the Contractor's performance as determined solely by LCWDA.**

Section 4. Requirements & Specifications for Services

4.1 Background

One-Stop Centers in all 88 Ohio counties provide services to local businesses and employed or unemployed job seekers. One-Stops work with county agencies and other partners to deliver a variety of employment and training services to meet the needs of local customers, whether that customer is a Fortune 500 company opening a new office or an 18-year-old looking for a first job.

Business customers can expect services such as job posting, pre-screening, employee assessments, opportunities for job fairs, various training options, layoff aversion and rapid response, and mass recruitment.

Job seeking customers can expect services such as access to resource rooms, job-related workshops, supportive services, individual training accounts, and other activities that match job seekers to employment. Specific services available in a One-Stop are designed to meet local needs and may vary from county to county.

Workforce Investment Act. WIA (the federal Workforce Investment Act of 1998, P.L. 105-220), was enacted in August 1998 to consolidate, coordinate and improve employment, training, literacy, and vocational rehabilitation programs in the United States. WIA restructures approximately 60 workforce development programs into an integrated workforce investment system that can better respond to the employment needs of its customers—employers as well as current workers, unemployed workers, workers laid-off due to restructuring or downsizing, and new entrants to the labor force. (See <http://usworkforce.org>, <http://www.doleta.gov/>, <http://jfs.ohio.gov/workforce/>, or <http://www.co.lucas.oh.us/index.aspx?NID=201> for information on WIA)

WIA envisions a workforce investment system that is built around seven key principles:

Streamlining Services: Integrating multiple employment and training programs at the “street level” through the One-Stop delivery system. Integration will simplify and expand services for job seekers and employers.

Empowering Individuals: Customers will be empowered to obtain the services and skills they need to enhance their employability. Empowerment will be accomplished through Individual Training Accounts and access to consumer reports, which will provide customers with information about training providers' services and performance.

Universal Access: Through the One-Stop system, every customer will have access to a set of core employment related services.

Increased Accountability: Providers of services will be held accountable for meeting employment related performance measures. Providers continued access to funding is directly related to their performance.

Local Oversight: Local boards (such as the WIB and its Youth Council) with involvement from the private sector will be responsible for local program planning and oversight of the local system. Input from the local level is to be utilized at the state level for statewide planning.

Local Flexibility: WIA provides local flexibility to improve systems and encourages innovative and comprehensive workforce investment systems. Local partners play a key role in policy development that is customized to meet the needs of the community.

Improved Youth Programs: WIA seeks to expand youth programs by encouraging a close connection to the local labor market and communities with strong connections between academic and occupational learning. Youth development activities, employment and training services and links to local and statewide initiatives are all components of WIA youth programs.

Guiding Principles

Workforce Investment Board of Lucas County (WIB): Mission, Vision and Values

The mission of the WIB is to provide leadership for the development of a comprehensive workforce system that brings together job seekers, employers, workers, educators, government and other partners to strategically increase the economic viability and quality of life in Lucas County/NW Ohio through planning, partnership, and effective resource management. Our vision is to be a valued resource to organizations and systems pursuing strategies designed to enhance the capacity, skill and well-being of our present and future workforce.

Values of the WIB

Customer Service: We believe that superior customer service to our employer and job seeker customers, Partners and stakeholders is paramount to our being successful in the Northwest Ohio market.

Partnership: Partnership is essential to the effective implementation of our mission. We believe that organizations working together, in a collaborative effort, create synergy towards efficiently meeting community needs.

Stewardship: We assume full responsibility for the resources and responsibilities that are within our purview. We understand that through conscientious and shared oversight, we can effectively generate the results our customers and stakeholders expect from their local workforce system.

Continuous Quality Improvement: We embrace ongoing innovation and transformation as a means of continuously improving the quality and sustainability of our results.

Results: Because results are what we are accountable for, we believe in the importance of systematic measurement and evaluation of effort to ensure that the plans and strategies adopted by The WIB produce the right results.

Roles and Responsibilities of the Lucas County Workforce Development Agency.

The purpose of this section is to clarify the roles and responsibilities of The Source's Operator ("Operator") and LCWDA. It is the responsibility of LCWDA as the administrative entity of WIA to work with the WIB relative to the operation of the One-Stop system in Lucas County. In this capacity it has been assigned the following roles and responsibilities as approved by the WIB:

- **Policy Guidance:** The LCWDA retains the responsibility for interpreting and implementing federal and state policy guidance.
- **WIB and Related Committee Support:** LCWDA will provide administrative and logistical support to the WIB, along with all of its subcommittees.
- **Elected Officials Liaison:** LCWDA will be the primary point of contact between the One-Stop System and the local elected officials.
- **State/Federal Liaison:** LCWDA will be the primary point of contact between the One-Stop System and state and federal oversight bodies.
- **Marketing:** The LCWDA retains the oversight of the marketing of the One-Stop System, in coordination with the Operator and other Partners. LCWDA will have final approval over marketing campaigns, slogans, or logos used in Lucas County.

- **Rapid Response Activities:** LCWDA retains the responsibility to provide Rapid Response Services to businesses that employ Lucas County residents. Rapid Response activities include: providing affected workers with information about WIA Services; providing referrals to the Operator, subcontractors, and other Partners as appropriate; and, coordinating on-site WIA Registration sessions, as requested by the businesses.
- **Identify System Needs and Address Service Gaps:** LCWDA reserves the right to issue RFPs and contracts for additional services without the consent of the Operator, based on the identification of service gaps in the One-Stop System.
- **Monitoring of Program Records:** LCWDA will retain the responsibility for local monitoring of all WIA programs and activities including universal core performed by the One-Stop Operator and Subcontractors. The WIA Monitors will have access to all files, data bases, and computer programs necessary to evaluate program compliance and effectiveness.
- **Information Updates:** LCWDA will ensure that the Operator, along with any other subcontracted entities, provide data and other support as requested by the LCWDA or the WIB.
- **Eligible Training Providers:** LCWDA will be responsible for the identification and request approval from the WIB of all training vendors who apply to be Eligible Training Providers of WIA training funds in Lucas County.
- **Labor Exchange Services:** LCWDA will retain general oversight of job and business development for the workforce system.

Roles and Responsibilities of the LCWDA Administrative Entity and Fiscal Agent, including its service providers.

The purpose of this section is to clarify the roles and responsibilities of the LCWDA as the Fiscal Agent relative to the fiscal management of WIA funds. These roles and responsibilities include:

- **General Management of Funds:** On behalf of the Commissioners, the Fiscal Agent will manage and disburse any federal, state, and local funds used to support the Lucas County WIA system.
- **Funds Utilization:** Successful bidders must comply with the limitations on funds utilization that are outlined in the WIA legislation.
- **Payment of Contracts:** Successful bidders will be paid according to services rendered, as contracted by the LCWDA, and tied to LCWDA goals.
- **Invoices:** Successful bidders must submit invoices on a monthly basis.
- **Unallowable Project Costs:** Fiscal Agent will not pay for unallowable project costs. Unallowable costs are defined as costs that were not part of the negotiated project budget, or prohibited by local, state, or federal regulations.
- **Monitoring of Program Records:** LCWDA will retain the responsibility for local monitoring of all WIA programs and activities performed by the Operator and any of its subcontractors. These monitors will have access to all files, data bases, and computer programs necessary to evaluate program compliance and effectiveness.

Note: The above roles and responsibilities and/or the Operator’s contract may be changed as:

- Final regulations and procedures are developed by the U. S. Department of Labor;
- State Law and requirements are enacted and implemented covering the State’s workforce development system, and
- Local direction and procedures are adopted by the WIB and/or Commissioners.

(Note: Changes in the “Agreement By and Between Board of Commissioners of Lucas County, Ohio and the Workforce Investment Board of Lucas County” regarding roles and responsibility will supersede anything written here.)

4.2 Project Overview

This RFP is seeking proposals from Bidders that can provide all specified activities within the program area defined below:

Objectives: To ensure One-Stop Certification by the WIB and the State of Ohio; to oversee and coordinate the day-to-day operations of The Source to ensure that jobseekers are matched with employment through Provider(s) for One-Stop Services

Partners of The Source (“Partners”), providers, business and any activities sponsored by The Source; to track, compile, and oversee all necessary data including business services and the universal customer; to invoice all Partners per the terms of the WIB’s Strategic Business Plan; to re-coup the actual costs of The Source; and to stock, secure, and maintain the equipment and materials available in The Source’s Resource Room and other designated areas.

The cornerstone of the workforce investment system is a One-Stop service delivery system. This delivery system is the mechanism through which programs and services are integrated. This One-Stop delivery system offers a three-tiered approach. **The first tier, Core Services**, is universally available to all interested persons and provides high-quality computer-assisted informational services and other self-service activities which customers can access on their own to assist them in obtaining employment. **The second tier, Intensive Services**, provides more intensive, case management centered service delivery, which offers a broad array of more in-depth services such as comprehensive assessments, productivity seminars, skills upgrade training, educational services and job placement services. **The third tier, Training Services**, provides literacy services, occupational skills training via vouchers to local public and proprietary schools, on-the-job training, and customized training.

Scope of Work: (Direct services or sub-contracted)

LCWDA is seeking the services of a contractor who will assist in meeting the following objectives. Bidders must provide a description of how these objectives would be achieved as the operator of The Source:

- Achieve and maintain One-Stop Certification under the WIB-defined performance goals and the State of Ohio Certification.
- Provide management and/or services to The Source facility (ies), which will identify and reduce barriers to employment that may prevent individuals from finding and maintaining employment, or successfully completing training for careers with the potential of achieving self-sufficiency.
- Work with the Partners to coordinate the day-to-day operations of The Source facility(ies).
- Develop and maintain a menu of services for both the job seeker and businesses which use The Source to promote job matching.
- Become knowledgeable about the mission and performance standards of each Partner, and facilitate cross-training among the Partner agency staff.
- Facilitate cross referral and co-enrollment arrangements among Source Partners and other co-located entities.
- Report to the LCWDA all performance data, including the number served under each funding stream, as well as information about job seeker and business activity at The Source.
- Develop and manage a continuous improvement plan for The Source by soliciting and acting upon feedback from job seeker and business customers, the Partners, the community, the State of Ohio, and the WIB.
- Monitor the budget of The Source in coordination with the LCWDA (“Fiscal Agent”) to ensure that all expenses are invoiced in a timely manner, and that all monies are expended effectively.
- Invoice each Partner’s share of The Source’s expenses as negotiated.
- Work with the community and the Partners to attract new and enhanced resources for The Source customers, including both businesses and job seekers.
- Pursue additional funding, as appropriate, from federal, state, local, and private entities to expand the services and functions of The Source.
- Ensure that the policies and procedures of the WIB, the Commissioners, and the Fiscal Agent are effectively communicated and carried out.
- Negotiate, develop, and manage the Resource Cost Sharing Agreement in accordance with the Business Plan ensuring fair distribution of cost to all Partners based on the benefit each receives. (See state template at www.ohioworkforce.org)
- Act as The Source’s “mall manager” by maintaining and spearheading improvements in the physical building, its equipment, and its furnishings.
- Contribute to the internal customer service of all staff assigned to the facility and promote teamwork among the Partner agencies.

- Represent The Source at meetings and events in Lucas County, the State and in the region.
- Increase the percentage of business/community awareness and usage of The Source, and the services it offers as measured in annual surveys.
- Increase the documented Customer Satisfaction scores at The Source as computed on a yearly basis.
- Ensure that all areas of The Source meet the requirements of the Americans with Disabilities Act (ADA) and the regulations hereunder.
- Retain the oversight for providing training and capacity building to retain knowledgeable, motivated, and capable staff and Partners within The Source.
- Establish and maintain regular meeting schedules with the subcontractor(s) of the successful bidder, if applicable, Partner agencies, the WIB and its One-Stop Committee, and the WIA administrative entity to help achieve mutual goals and responsibilities.

Section 5.0 Technical Requirements

Bidder(s) must demonstrate the ability to meet the following requirements:

- Internet access with a minimum of 56K baud modem rate.
- The ability to import and export data from LCWDA via various types of formats such as text files, Microsoft Excel, Microsoft Word, Microsoft Access, or other formats as agreed upon by LCWDA and Bidder. Systems used for data sharing may include SCOTI, Ohio Means Jobs (OMJ), or any other system required by the Ohio Department of Job and Family Services (ODJFS).
- Have database backup capabilities of LCWDA data and have a disaster recovery plan in the event that LCWDA data is corrupted or destroyed by system failure or acts of nature.
- In the event Bidder(s) would desire to enter into any subcontract involving the direct delivery of sharing of LCWDA data, written notification would be given and prior approval to any subcontract would be sought by Bidder(s) by LCWDA.
- Must maintain current technology updates as required by LCWDA in regard to Internet browser versions.
- Comply with LCWDA requirements for providing a secure environment for LCWDA data.
- Supply LCWDA with reports or statistics for proposed project.
- Have properly working hardware and software to retrieve, import, and export LCWDA data.
- Maintain an up to date anti-virus software program.

Section 6. Application Format

6.1 Required Format Specifications

To be accepted and forwarded to the Review Committee, the proposal must be received on or before the deadline and include attachments 1-10 as provided by LCWDA. Each document requiring a signature and/or notarization must be provided in the form of a scanned version of said document. All documents must be submitted via email with each document saved as the document names listed in the "Overall Application Checklist" preceded by the name of the bidding organization. I.E. "Non-collusion Affidavit-Company X".

Complete all sections of the RFP as instructed. Proposals not meeting the following format specifications will have up to a maximum of five (5) points deducted.

A 12-point "Times New Roman" font must be used. Page margins are to be 1" on all sides of the page.

- Page is to be numbered on the bottom right of each page.
- Pages are to be single sided.
- Lines must be single spaced.
- Must remain within the number of pages as instructed.

6.2 Application Components

This section provides additional information to be used when completing the electronic attachments:

A. RFP Cover Page

- Use form provided
- Must be completed and signed

B. Service Description Packet (Forms 1-5)

B1. Service Summary

- Use form provided
- Not to exceed one (1) page in length.
- Brief explanation of the proposed services.

B2. Organizational Capacity

- Use form provided
- Not to exceed two (2) pages in length.
- Suitable administrative, accounting and management information systems in place.
- Sufficient staff with experience working with this population.
- Adequate policies and procedures in place.
- A demonstrated ability to work with other organizations in meaningful collaborative and/or partnership manner.

B3. Prior Successful Experiences with Proposed Services and Target Population

- Use form provided
- Not to exceed three (3) pages in length.
- Describe the organization's experience in providing the proposed services to the target population.
- Include a description of the organization's record of program participants' successful attainment of program goals.

B4. Description of Program and Service Delivery

- Use form provided
- Not to exceed four (4) pages in length.
- The proposed program and service delivery model must respond to the requirements described in this RFP.
- The key components of the service delivery model must be clearly identified and described as well as the specific strategies employed to achieve the intended results.
- Partnerships, if used, should be described in detail.
- A timetable of program operations must be included.
- Bidder must have prior successful performance demonstrated in this service area.

B5. Internal Evaluation and Accountability

- Use form provided
- Not to exceed two (2) pages in length.
- The Bidder should be able to demonstrate the ability to document, track, analyze data, and submit weekly, monthly and quarterly reports to LCWDA.
- Meaningful benchmarks, performance measures, and outcomes should be identified.
- The stated rationales for targeted performance measures should be sound.
- The organization should be able to demonstrate the ability to document, track, and analyze participant and program progress and have the systems in place to accomplish this.
- The organization should have the tools and methods in place to measure customer satisfaction.

C. Attachments 3-10

To be completed as indicated on each form.

6.3 Collaboration Letters

LCWDA strongly encourages Bidders to demonstrate collaborations and service linkages that would assist in achieving the objectives stated in this RFP. A maximum of twenty-five (25) collaboration letters will be accepted.

Those collaborative relationships that are integral to the program design should be described in the Program and Service Delivery section of the Bid Packet.

Each Collaboration Letter must include:

- Organization name
- Address
- Phone number and fax number
- Contact person
- Nature of relationship

(LCWDA, at its sole discretion, may elect to contact references during the review process. If references cannot be provided, explain why.)

6.4 Personnel Qualifications

Please include the following information as it related to the services(s) contained in the bid:

- Table of Organization
- Resumes of key personnel who will be directly involved with the proposed services.
- Professional licenses
- Alternate signing letter-this letter, on company letterhead, indicating any other staff member(s) who is/are permitted to contractually obligate the selected bidder.

6.5 Budget Narrative and Budget Form

Bidders should present a sound approach to budgeting for the various aspects of program management and implementation.

A. Budget Narrative

Provide a description of revenues and expenses ("Budget Narrative"). The Budget Narrative must not exceed two (2) pages. Describe necessity and reasonableness of each budget line item. Statements should be concise and clear and not simply a restatement of the information presented in the budget. The budget should be developed with advice and assistance of Bidder's fiscal officer (if applicable), or from an accounting professional knowledgeable in this type of program and funding source. Although there is no match requirement, provide a summary of other funding that Bidder receives and, specifically, reference funding that will contribute to overall funding for the proposed program. While not required, organizations that can leverage other sources of funding will be rated higher.

B. Budget Form (Attachment 11)

Complete LCWDA Program Budget Form, which will be provided electronically upon request. The budget will be evaluated in accordance with standard accounting principles, clear support of proposed program components and cost effectiveness.

INSTRUCTIONS FOR COMPLETING THE CONTRACT BUDGET

The Contract Budget is to include all of the financial information regarding the Bidder's program. This includes all funding for the program, both federal and non-federal, and all related federal expenses. It is important that consideration be given to all projected program expenditures in preparation of the Contract Budget. The Contract Budget not only serves as a basis for Bidder's funding and reimbursement for the program expenses, but also represents the amounts that will initially be considered as allowable federal program expenses. Any expenditures that are not included in the initial budget may require renegotiation of the budget prior to the expenditure being allowable for the program. Amounts approved on the budget do not indicate the amounts that will be reimbursed but are estimates of the possible reimbursement. All amounts invoiced to LCWDA will be based on actual expenditures of funds and only those actual expenditures are reimbursable.

The budget is broken down into the major areas of expense. Behind the Contract Budget, and an integral part of the budget process, are the detailed expenses determining the overall budget. The Contract Budget amounts are calculated based on the detail presented on the Estimated Cost of Delivery of Purchased Services pages. It is very important that these estimates are adequately developed to ensure the Contract Budget includes the funding needed to provide all program requirements.

Contract Budget Page

The basic information for Bidder's program needs to be entered in the top box of the Contract Budget page. No other information is needed.

- Provider Information: Insert Bidder's name, address, phone, fax, and e-mail in the left column of the box.
- Service Program: The name of Bidder's federally funded program
- Period: Will be approximately 7/1/2012 – 6/30/2013, unless contract is signed later in the fiscal year.
- Budget Prepared By: This should be the person who prepared the budget as well as the contact person for any questions on the budget.
- Date: This should be the date the budget was finalized.

No additional information needs to be input on this page but once all of the Estimated Cost of Delivery of Purchased Services pages are completed, the Contract Budget should be reviewed for accuracy.

Estimated Cost of Delivery of Purchased Services

These details support Bidder's Contract Budget. These amounts are to be based on estimated expenditures to provide the program services outlined in the bid. All related expenses required to provide these services need to be considered and included in these estimates. Reimbursement will be based on actual expenditures but are limited by the amounts included on these pages.

STAFF COSTS (SECTION I):

EMPLOYEE SALARIES: Include each position that will be directly charged to the program, the number of people in each position, and the position's annual salary. Indicate whether each position is filled or vacant (to be filled later). Filled positions should include the names of those employees filling them. Indicate the estimated total hours per week worked and hours to be worked on the proposed program. Indicate the number of months the position will be charged to the program if not a full year (for example a vacant position that will be filled for only 6 months of the program). Based on this input, the total annual salary for each position, percentage of time to the program and reimbursable salary will be calculated. Input the percentage of the program that may be funded through this RFP. For example, if this bid covers \$50,000 of a \$200,000 program, insert 25%.

PAYROLL RELATED EXPENSES: This section includes expenses related to payroll for the employees listed under employee salaries including all fringe benefits such as employer matching amounts, worker's compensation, retirement, insurance, etc. If a percentage is entered, the amount will be calculated based on the total reimbursable salaries from the Employee Salaries section. Amounts may also be entered directly into the "amount" column. If items are to be included that are not listed, these must be specified.

NON-EMPLOYEE SALARIES: This section covers any positions that will be directly charged to the program paid outside of the normal payroll system, including contract employees such as an outside accounting firm, teachers, or health care professionals that are paid on an hourly basis. Enter the same information in this section as entered for the Employee Salaries section above.

ADMINISTRATIVE COSTS AND PROFESSIONAL FEES: This section includes all personnel costs that have not been previously recorded. Examples include an accounting firm paid on a contractual monthly basis, audit costs, legal fees, and administrative charges allocated to the proposed program. Any allocated charges to the program are to be derived from an accurate, documented cost allocation plan.

PROGRAM COSTS (SECTION II):

TRAVEL & TRAINING

Travel Expenses: Include any projected travel costs related to the service delivery of the proposed program. This may include field trips, home visits, meetings, employee travel expenses, and necessities for vehicles utilized for the program. Purchased transportation would include transportation for a fee such as taxi or bus fare.

Agency Training Expenses: Include expenses related to training of staff to provide the proposed services. This may include registration fees, lodging, meals, transportation fees, conference materials, etc. If the training will benefit multiple programs or funding sources, only the portion directly applicable to the bid should be included.

CONSUMABLE SUPPLIES: Include any projected need for supplies to implement the proposed program including direct program supplies such as books and materials, and indirect supplies for managing the program such as office and cleaning supplies.

OCCUPANCY COSTS: Occupancy costs are to be based on three factors: (i) The square footage needed by the proposed program as a percentage of total facilities square footage; (ii) the annual rent or depreciation cost (if Bidder owns the building); and (iii) the percentage of the overall program funded through the bid to LCWDA. Bidder must provide square footage for the program and the building; either the annual cost of rent per square foot or the annual depreciation figures, and the percentage of program funding provided through this RFP should the Bidder be awarded a contract. The charges to the Contract Budget will be calculated from these figures.

The expense for utilities and maintenance and repair should include the overall expenses which will then be prorated to the program based on building square footage and the portion of the proposed program to be funded through this RFP. If there are specific utilities related only to the portion of the program the Bidder proposes LCWDA fund, list these separately and the amount chargeable to the Contract Budget will be calculated based on the percentage of the program for which the bid is seeking funding.

INSURANCE COSTS: Include all non-vehicle insurance costs in this section and the percentage of these costs directly related to the proposed program.

OTHER MISCELLANEOUS PROGRAM COSTS: Include in this section any projected expenses that are not listed under any other area of the Contract Budget.

EQUIPMENT COSTS (SECTION III):

EQUIPMENT SUBJECT TO DEPRECIATION: This section includes all equipment utilized by the program that exceeds Bidder's fixed asset threshold or \$5,000, whichever is lower. For example, if Bidder's fixed asset threshold is \$500, any piece of equipment over \$500 is to be included here. However, if Bidder's threshold is \$7,500, all individual items over \$5,000 are to be included here. The equipment costs listed here will be reimbursed based on the annual usage associated with the proposed program's portion of the equipment's usage. Please list each item of equipment separately with the required information in Part A. In Part B, include the useful life as determined by Bidder's fixed asset policy and the percentage the equipment will be utilized by the proposed program. This percentage should take into consideration both the percentage of use by the program and the percentage of the program that may be funded through this RFP. For example, if a vehicle is 50% to the program and your bid includes 50% of program funding from another source, the percentage would be 25% (50% of 50%).

SMALL EQUIPMENT PURCHASES: This section includes all purchased equipment utilized by the program that was not included above. This equipment will be reimbursed as purchased based on the proposed program's percentage of the equipment's use. To calculate the percentage to the Contract Budget, take the percentage to the program times the percentage of proposed LCWDA funding of the program as noted above.

LEASED AND RENTED EQUIPMENT: Include those items of equipment to be utilized by the program that are leased or rented. Once again, to calculate the percentage to the Contract Budget, take the percentage of the equipment's usage to the program times the percentage of the program that may be funded through this RFP as noted above.

EQUIPMENT REPAIR AND MAINTENANCE: Include repairs and maintenance to equipment utilized by the program. Remember to calculate the percentage to the Contract Budget by taking the percentage to the program times the percentage of the proposed portion of LCWDA funding of the program as noted above.

TUITION CHARGES (SECTION IV) (TUITION BASED PROGRAMS ONLY):

If the program is a tuition-based program, fill in the appropriate information for each type of program. "Total Program Units" will include all projected participants in the program. "Units Under Contract" will only include projected participants reimbursable by LCWDA.

UNIT RATE CHARGES (SECTION V) (APPROVED PROGRAMS ONLY):

If the proposed program has been approved for unit rate charges, fill in the appropriate information for each type of service unit. "Total Program Units" will include all projected units in the program. "Units Under Contract" will only include projected units reimbursable by LCWDA.

INCOME PAGE:

On this page Bidder must disclose all projected funding for the organization.

Part A: Include all funds for the program for which Bidder is seeking funding. For example, if Bidder is proposing that LCWDA fund \$50,000 of a \$200,000 program, there should be \$50,000 listed under LCWDA and another \$150,000 in other funding categories. For each type of federal, state, or county funding, please specify the source and type of funding received. As an example, Bidder may receive TANF monies through Lucas County Family Council or Title XX money through LCDJFS.

Part B: Include all projected funding for Bidder's organization. Once again please specify each source and type of federal, state, or county funding Bidder plans to receive. Please be aware that many federal and state funds are passed through local governments and other organizations. Bidder may need to contact the granting agency to find out the true source of these funds.

UNALLOWABLE COSTS:

Use of federal funds for prohibited purposes will result in the loss or recovery of those funds. Funds may not be utilized for the following:

- Advancement of political or religious points of view, fund raising or lobbying.
- Distribution of factually incorrect or deceitful information.
- Consulting fees for salaried program personnel to perform activities related to the program.
- Bad debts of any kind.
- Lump sum indirect or administrative costs.
- Contributions to a contingency fund.
- Entertainment (for example paying for entertainment for management).
- Fines and penalties.
- Interest or other financial payments.
- Contributions made on behalf of program personnel.
- Costs to rent equipment or space owned by the funded agency.
- Inpatient services.
- The purchase or improvement of land.
- The purchase, construction, or permanent improvement of any building.
- Satisfying non-federal fund matching requirements to receive any federal funding.
- Contracts for compensation with advisory board members.

Cover Page: Bidders must use Attachment 1 (cover page) as provided in this RFP. Complete all sections of the Cover Page form. Bidder's authorized representative must sign the Cover Page which shall be scanned for submittal.

Bidders must include all required documents. The maximum number of points that can be awarded for each section of the Service Description Packet and overall formatting is provided (Selection Process - Rating Sheet). Total possible points = 150.

Section 7. Attachments & Application Checklist

7.1 Attachments:

The documents listed below are to be completed in their entirety by the Bidder. These documents will be sent upon request. Contact Michelle Niedermier via email at niedem@odjfs.state.oh.us and indicate the name of your organization, the contact person and the email address where the electronic documents should be sent (no hard copies or faxes shall be sent). The documents will be sent within two (2) business days. If you do not receive the documents within this timeframe, please contact Michelle Niedermier at 419-213-8871 to ensure receipt of the original email request. Please allow adequate time for receipt and completion of the documents prior to the 4:00 p.m., April 6, 2012 deadline. **NO REQUESTS FOR ATTACHMENTS WILL BE ACCEPTED AFTER 4:00 P.M., April 4, 2012.**

1. Attachment 1 -- RFP Cover Page
2. Attachment 2 -- Service Description Packet (Forms 1-5)
3. Attachment 3 -- Non-Discrimination and Equal Employment Opportunity Affidavit
4. Attachment 4 -- Non-Collusion Affidavit
5. Attachment 5 -- No Findings for Recovery Affidavit
6. Attachment 6 -- Delinquent Personal Property Tax Statement
7. Attachments 7 & 8 -- Ohio Homeland Security – Declaration of Material Assistance Form (Attachment 8) [Terrorist Exclusion List (Attachment 7) will be included with this form as a reference]
8. Attachment 9 -- Representations, Assurances and Certifications
9. Attachment 10 – LCWDA Performance Measures Form (complete form through Line A)
10. Attachment 11 -- LCWDA Budget Form (to be preceded by a 2-page budget narrative)

7.2 Application Checklist (all documents to be completed and scanned; delivered via email):

- RFP Cover Page (signed)
- Service Description Packet (Forms 1-5)
- Non-Discrimination and Equal Employment Opportunity Affidavit
- Non-Collusion Affidavit
- No Findings for Recovery Affidavit
- Delinquent Personal Property Tax Statement
- Ohio Homeland Security – Declaration of Material Assistance Form (Attachment 8) [Terrorist Exclusion List (Attachment 7) will be included with this form as a reference]
- Representations, Assurances and Certifications
- LCWDA Performance Measures
- LCWDA Budget Form (to be preceded by a 2-page budget narrative)
- Collaboration Letters
- Personnel Qualifications (including Alternate Signing Letter, if applicable)