

**Lucas County Department of Job & Family Services  
By the Authority of the  
Lucas County Board of Commissioners**

**REQUEST FOR PROPOSALS**

**(48-11-RFP-01)**

**For the selection of:**

**Various Social Services for  
Residents of the  
North Toledo Community**

**Calendar Year 2010**

**Issued by:**

**Lucas County Department of Job & Family Services  
3210 Monroe Street, P.O. Box 10007  
Toledo, Ohio 43699-0007**

**Release Date: March 12, 2010**

**Lucas County Department of Job & Family Services  
Mission Statement**

**“We assist Lucas County families and individuals to achieve their highest level of stability and independence. Respecting the dignity of our clients, we provide effective career development opportunities and individualized services in cooperation with our community partners.”**

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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 Department of Job and Family Services (“LCDJFS”), through the Lucas County Board of Commissioners (“Board”), is seeking Proposals for the provision of comprehensive, long-term financial coaching, outreach and assistance with accessing needed services and resources for residents of the North Toledo Community. Clients served in all categories of this RFP must reside in Lucas County. LCDJFS is seeking a single provider for the services sought through this RFP.

Successful Bidder will provide all targeted program areas:

- **Long Term Financial Stability Coaching**
- **Assistance with Accessing Public Benefits and Other Needed Services**
- **Community Outreach**

The RFP also 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 LCDJFS 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 clients’ outcomes.

### **Allocation and Target Population:**

- LCDJFS has designated \$200,000 in Temporary Assistance for Needy Families (TANF), Title XX, and Child, Family, and Adult Community and Protective Services Allocation (CFA) funds for Calendar Year 2010, for the purchase of services requested through this RFP. Such services are to be provided to residents of the North Toledo Community who access services through the Financial Opportunity Center under the direction of United North. It is anticipated that a minimum of 150 people will receive Long Term Financial Coaching with additional community residents receiving assistance in assessing other needed services.

### **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 LCDJFS contract 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 12, 2010 at 12:00 P.M. (local time).

If a suitable proposal or proposals made in response to this RFP is/are selected, LCDJFS, 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 LCDJFS will evaluate the proposal, and what will be required of the Selected Bidder in performing the work.

Once awarded, the Contract Period will begin on the award date and will last through December 31, 2010, with the potential of an additional one-year contract extension contingent upon need, performance and availability of funds.

### 1.1 Time Table

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

RFP (48-11-RFP-01) Release Date	March 12, 2010
Deadline for Electronic Bidder Q&A Submittal	March 23, 2010 4:00 P.M.
Posted Responses to Q&A*	March 26, 2010
Deadline for Submitting Proposals	April 12, 2010 at 12:00 P.M.
Notification of Awards	Approximately April 21, 2010
Contract Development	Approximately April 22 through April 30, 2010
Project Implementation	Approx. May 12, 2010 through December 31, 2010

\* <http://www.co.lucas.oh.us/Bids.aspx>

### 1.2 Contact Person

Michelle Niedermier  
Lucas County Department of Job & Family Services  
3210 Monroe Street, P.O. Box 10007  
Toledo Ohio 43699-0007  
Phone: 419.213.8871  
Fax: 419.213.8820  
Email: [niedem@odjfs.state.oh.us](mailto:niedem@odjfs.state.oh.us)

### 1.3 Electronic Bidders' 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 4:00 p.m. March 23, 2010. 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](mailto:niedem@odjfs.state.oh.us) by March 23, 2010 at 4:00 p.m. These questions will be posted on the Lucas County website at <http://www.co.lucas.oh.us/Bids.aspx> on March 26, 2010 as stated above. **Bidders contacting any member of the review committee regarding this RFP, or any member of LCDJFS's staff or its agents, other than via the Bidders' Conference, risk elimination of their Proposal from further consideration.**

### 1.5 Bidder Disclosures

A 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 LCDJFS employee anything of value that could influence that employee's decision on awarding a contract. No Bidder shall attempt to influence an employee of LCDJFS to violate the procurement policies of LCDJFS, the ORC, OAC or Federal Procurement Regulations. In addition, Bidder acknowledges and agrees to abide by LCDJFS' written code of minimum ethical standards, which became effective January 1, 2007. A copy of the ethics code may be requested from the Contact Person.

### **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 e-mail attachment on organizational letterhead is acceptable). Clarifications and corrections will be posted at <http://www.co.lucas.oh.us/Bids.aspx>.

### **1.8 Ability to Award Contract**

This RFP and any LCDJFS contract awarded under this RFP ("Contract") 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. LCDJFS 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 LCDJFS, a Selected Bidder must agree to indemnify and protect LCDJFS 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**

LCDJFS does not pay local, state or Federal taxes. If requested, a Selected Bidder will be furnished with an exemption certificate.

### **1.11 Compliance with the Law**

A Selected Bidder 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. LCDJFS will provide training to the Selected Bidder regarding such rules. Funds distributed through this RFP are Federal Department of Health and Human Services TANF and Title XX funds as well as State-issued CFA funds. Procurement rules for Health and Human Services are located in the Code of Federal Regulations (CFR): 45 CFR 74.41-74.48.

ORC Section 9.24 prohibits LCDJFS 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 LCDJFS 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 LCDJFS and may be returned only at LCDJFS' option. Proprietary information should not be included in a proposal or supporting materials because LCDJFS 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.

LCDJFS 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 or until audited. After the retention period, LCDJFS may destroy or otherwise dispose of the proposal and/or any copies.

LCDJFS 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 LCDJFS delivers to the Selected Bidder remain the property of LCDJFS. 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 LCDJFS, or individuals or organizations with whom LCDJFS 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, LCDJFS and, by extension, a Selected Bidder who has entered into a Contract with LCDJFS ("Contractor"), are 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.
- 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 LCDJFS 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 LCDJFS and will be considered public information available for inspection following the selection of a proposal.

### **2.2 Proposal Cost**

The Bidder is fully responsible for all costs associated with the development and submission of the proposal. LCDJFS 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.**

**It is the responsibility of the Bidder to clearly indicate which of the submitted copies of the proposal is an originally-signed document. If the Bidder does not indicate an original, LCDJFS will designate and mark one of the copies as an original and that designation will become binding if there is ever a dispute concerning the original submission.**

## **2.5 Delivery of Proposals**

A Bidder's written proposal must be received by LCDJFS by 12:00 P.M. local time on April 12, 2010. There are no exceptions to this deadline and any proposal received after the deadline will be immediately rejected. A Bidder must mail or hand deliver one (1) signed original proposal and seven (7) copies along with an electronic version of the document on a CD-ROM or flash drive in Word or PDF format and in Excel for applicable forms. These must be submitted to:

**Lucas County Department of Job & Family Services  
RFP for North End Services  
Attention: Michelle Niedermier  
3210 Monroe Street, P.O. Box 10007  
Toledo, Ohio 43699-0007**

Proposals delivered by hand prior to April 12, 2010 must be delivered to the Security Desk. For hand-delivered proposals submitted on April 12, 2010, a designated and clearly marked proposal delivery area will be located in the lobby of LCDJFS. A receipt will be issued for all proposals received by LCDJFS via hand delivery. Proposals may not be submitted at any other LCDJFS location. If mailed, the Bidder must use certified or registered mail with return receipt required, or a private delivery or courier service (e.g., Federal Express, UPS, etc.). **Faxed or e-mailed proposals, as well as those sent by Standard U.S. mail, will not be accepted.**

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 LCDJFS. Notwithstanding the foregoing, LCDJFS may request additional information for clarification purposes only.

## **2.6 Acceptance & Rejection of Proposals**

LCDJFS reserves the right to reject any or all proposals. The selection of a proposal by the LCDJFS shall be final upon approval by the Board.

## **2.7 Evaluation & Award of Contract**

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

A. **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 at the address indicated in the RFP **by 12:00 p.m. (local time), April 12, 2010. A proposal not received at the designated address by the specified date and time will be rejected.**
- The Cover Page of the proposal must be signed by an authorized representative of the Bidder (see Section 2.4). One (1) signed original proposal and seven (7) copies and the CD-ROM or flash drive version (see Section 2.5) must be submitted. Please refer to Section 1, "General Information" for additional details regarding this requirement.

## **B. Review Committee Process**

- All proposals meeting the requirements of Section 2.7(a), above, will be reviewed, evaluated and rated by a Review Committee that may be composed of LCDJFS staff, specialists in the RFP program area and other community representatives. Review Committee representatives 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 Section 6 of this RFP, herein, including (but not limited to) maximum number of pages for the service description forms, font and line spacing specifications, and completion and inclusion of the cover page and all required attachments. Proposals must also include the required number of copies, as stated in Section 2.5, hereof. 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 and Section 6 of this RFP. In order to be considered for funding, a proposal must earn a minimum of one hundred twenty (120) points out of one hundred and fifty (150) points or, 80%.

## Proposal Evaluation Rating Sheet

Maximum Points	High	Moderately High	Average	Below Average	Poor	Unacceptable
<b>5 points</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>
<b>Application Format*</b>						
<i>Cover page signed, format specifications met, application assembly order and required number of copies.</i>						
<b>20 points</b>	<b>20-18</b>	<b>17-14</b>	<b>13-11</b>	<b>10-7</b>	<b>6-4</b>	<b>3-0</b>
<b>Service Summary</b>						
<i>Summary of the proposed services, activities, goals, collaborating activities (if applicable) and strategies for meeting LCDJFS desired results (not to exceed one page)</i>						
<b>25 points</b>	<b>25-22</b>	<b>21-17</b>	<b>16-12</b>	<b>11-8</b>	<b>7-4</b>	<b>3-0</b>
<b>Organizational Capacity</b>						
<ul style="list-style-type: none"> <li>• Suitable administrative, accounting and management information systems in place</li> <li>• Sufficient staff in place with experience working with this population</li> <li>• Adequate policies and procedures in place</li> <li>• A demonstrated ability to work with all relevant agencies and other organizations in meaningful collaborative and/or partnership manner</li> <li>• Not to exceed two pages</li> </ul>						
<b>25 points</b>	<b>25-22</b>	<b>21-17</b>	<b>16-12</b>	<b>11-8</b>	<b>7-4</b>	<b>3-0</b>
<b>Experience with Target Population</b>						
<ul style="list-style-type: none"> <li>• Description of the organization's experience in providing proposed services to the target population</li> <li>• Description of the organization's record of program participants' successful attainment of related goals</li> <li>• Not to exceed two pages</li> </ul>						
<b>50 points</b>	<b>50-43</b>	<b>42-34</b>	<b>33-25</b>	<b>24-16</b>	<b>15-8</b>	<b>7-0</b>
<b>Program Description and Service Delivery</b>						
<ul style="list-style-type: none"> <li>• A proposed program and service delivery model that responds to the areas described in Section 4.2 of this RFP</li> <li>• A clear identification of the key components of the service delivery model and description of the specific strategies employed to achieve the intended results</li> <li>• A detailed description of the established relationships with any specified referral sources and how service linkage and follow-up will occur</li> <li>• A timetable of operations</li> <li>• Demonstration of prior successful performance in this service area</li> <li>• Not to exceed three pages</li> </ul>						
<b>25 points</b>	<b>25-22</b>	<b>21-17</b>	<b>16-12</b>	<b>11-8</b>	<b>7-4</b>	<b>3-0</b>
<b>Internal Evaluation and Accountability</b>						
<ul style="list-style-type: none"> <li>• Bidder should be able to demonstrate the ability to document, track, analyze data, and submit monthly and quarterly reports to LCDJFS</li> <li>• Meaningful benchmarks, performance measures, and outcomes should be identified</li> <li>• The stated rationales for targeting these performance measures should be sound</li> <li>• 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</li> <li>• The organization should have the tools and methods in place to measure client satisfaction</li> <li>• Not to exceed two pages</li> </ul>						
<b>150 Total Points</b>	<b>150-126</b>	<b>125-100</b>	<b>99-74</b>	<b>73-49</b>	<b>48-24</b>	<b>23-0</b>

\*The Application Format points will take into account the entire Proposal Packet.

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 LCDJFS. This information must be based on factual data and, provided in writing.

The final composite Review Committee Evaluation Rating Sheet, which includes the Bidder's prioritized ranking, will be maintained on file by LCDJFS.

**C. Administrative Review** - Following the detailed scoring by the Review Committee, the results will be evaluated by LCDJFS administration in order to ensure that all facets related to predicted performance were considered. In selecting the successful proposal, the LCDJFS evaluation will take into consideration, 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 LCDJFS and at the sole discretion of LCDJFS, the Proposal best meets or exceeds LCDJFS's expectations;
- ✓ Scope of services being proposed;
- ✓ Collaboration letters;
- ✓ Any other factors considered relevant by LCDJFS and demonstrated by the Proposal or investigation by LCDJFS;
- ✓ Budget analysis, including reasonableness and cost effectiveness of proposed services;
- ✓ Any other factors considered relevant by LCDJFS, including performance on prior and current contracts with LCDJFS; and
- ✓ Experience with a similar project/program of comparable size and scope, including any available information regarding program results.

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 specified in Section 1.1 of this RFP, LCDJFS 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 LCDJFS 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 LCDJFS and the explanation for it must be in writing and received by LCDJFS within seven (7) business 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 2.5, 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). LCDJFS will work with the Selected Bidder(s) to finalize the details of the Contract document(s). **If LCDJFS, in its sole discretion, determines that LCDJFS and the Selected Bidder(s) are unable to successfully**

come to terms regarding the Contract within a reasonable time period, LCDJFS reserves the right to terminate discussions. If this happens, LCDJFS, in its sole discretion, reserves the right to either (i) select another Bidder from the bid process with whom to negotiate the Contract, (ii) cancel the RFP, or (iii) reissue the RFP.

### **2.10 Termination for Convenience**

LCDJFS 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**

LCDJFS 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. LCDJFS 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 LCDJFS a Corrective Action Plan ("CAP") that adequately addresses issues identified in the cure notice. Following the CAP's approval by LCDJFS, 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, LCDJFS will issue an order to stop work immediately and terminate the Contract without obligation.

## **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 LCDJFS. Failure of the Selected Bidder(s) to accept these obligations may result in cancellation of the award. Additionally, there is mandatory disclosure to LCDJFS of any modifications to names, addresses, phone numbers, facsimiles, email, etc. when such occurs during the duration of this Contract.**

### **3.1 Type of Contract and 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 LCDJFS. Acceptance or rejection of a proposed subcontract is at the sole discretion of LCDJFS. Proper procurement rules must be adhered to when obtaining a subcontractor.

### **3.2 Contract Period, Funding & Invoicing**

The term of the Contract shall be an approximate nine (9) month period, commencing no sooner than May 11, 2010, and ending no later than December 31, 2010. Subject to the availability of funds and at the sole discretion of LCDJFS (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 LCDJFS.

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 LCDJFS no later than the immediately following September 30.)** Generally,

**reimbursement by LCDJFS is made within thirty (30) days of receipt of an invoice for actual expenses.**

### **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 LCDJFS and/or providers referred by LCDJFS concerning confidentiality of LCDJFS providers and/or clients. Any use or disclosure of information concerning LCDJFS 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 LCDJFS 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 LCDJFS 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 LCDJFS which is totally independent and distinct from the audit requirements described in Section 1.11, hereof. LCDJFS will also conduct a contract Risk Assessment in accordance with the Ohio Department of Job and Family Services ("ODJFS") procurement rules.
- LCDJFS reimburses for services on both cost reimbursement, unit rate and tuition bases. The type of reimbursement depends upon the services to be delivered and the negotiated Contract terms. All invoices for services must be submitted monthly to LCDJFS (see Section 3.2, hereof). All amounts on the invoice are to be supported by documentation, as required by LCDJFS, 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.
- LCDJFS 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 LCDJFS 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, the Contract may be renewed for a one-year term. 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 LCDJFS.
- **LCDJFS reserves the right to extend and/or amend the Contract based on the Contractor's performance as determined solely by LCDJFS.**

## **Section 4. Requirements & Specifications for Services**

### **4.1 Background**

In 2007, the boards and trustees of the Lagrange Development Corporation (LDC) and the NorthRiver Development Corporation (NRDC) entered into a strategic alliance to better serve the needs of the 30,000 residents of north Toledo. The new umbrella organization, called United North or UN, employs the administrative staffs of both organizations. However, both Community Development Corporations (CDC's) continue to exist as legal entities and with their respective boards of trustees. The mission of United North is "To channel the synergy of collective north Toledo neighborhoods and create the avenue needed to stabilize, stimulate, rebuild, grow and organize."

United North held a series of community visioning sessions in 2007 to provide neighborhood residents and businesses the opportunity to assist in planning programs that lead to an improved quality of life for north Toledo residents. North Toledo includes approximately 27,000 people in a five square mile area located northeast of downtown Toledo. The community abuts Cherry Street to its west/southwest, Maumee River to its east/southeast, and I-75 (west of I-280) and Manhattan Boulevard (east of I-280) to its north. The planning process involved local residents, businesses and community leaders. The effort resulted in the community's Quality of Life Plan. The United North Planning and Vision Committee oversees the implementation of the Plan and five sub-committees were formed to address issues related to affordable housing, jobs and economic development, education and schools, community facilities, and community safety.

A key initiative included in the Quality of Life Plan is to establish "an umbrella structure that comprehensively addresses the community needs by connecting residents to jobs and job training, social and health service providers, and opportunities that help increase family income and assets." The Plan specifically sites the implementation of the *Annie E. Casey Foundation's Center for Working Families Family Model*.

On a national level, the Local Initiatives Support Corporation (LISC) provides technical support to communities in the implementation of Financial Opportunity Centers (FOC). FOC's are based on the Center for Working Families Model; currently there are FOC sites in Detroit, Indianapolis, Chicago, Milwaukee, Minneapolis and Oakland. United North is receiving technical assistance from LISC Toledo to develop the North Toledo Financial Opportunity Center. FOC's typically provide families with integrated services across three areas:

1. Employment placement and career improvement
2. Financial education and coaching, and
3. Public benefits access.

LCDJFS is committed to supporting the development of an FOC through this Request for Proposals and seeks a single community-based provider to employ personnel to provide comprehensive, long-term financial coaching, outreach and assistance with accessing needed services and resources. All services must be offered through the FOC, and outreach locations must be coordinated and approved by UN.

## **4.2 Project Overview**

This RFP is seeking proposals from Bidders that can provide all activities defined below. As specified by the Annie E. Casey Foundation ( [www.aecf.org](http://www.aecf.org) ), "the Family Opportunity Center brings together – or bundles – access to a full range of essential economic supports in a convenient location to help families build self-sufficiency, stabilize their finances, and move ahead. This approach makes it easier for families to tap into all of the services and supports for which they qualify, filling in the gaps and helping them weather unexpected setbacks. The program must be integrated into trusted community organizations and institutions and work with families on a long-term basis, providing supports to them as their needs change." Bidders are advised to learn more about this service approach by reviewing information at the Center for Working Families website [www.aecf.org](http://www.aecf.org) and Family Opportunity Center site at [www.LISC.org](http://www.LISC.org) . All services offered must be provided within the Northend community and located at the FOC or other community sites as approved by United North. UN will also provide program oversight and on site supervision and direction for all services. Services provided through this RFP must be offered in coordination with other FOC programs and services as they become available. Services requested through this RFP include long term financial stability coaching, assistance with accessing public benefits and other community resources, and community outreach.

### **A. Program Expectations:**

LCDJFS has dedicated \$200,000 for the services specified in this RFP. LCDJFS anticipates that a minimum of 150 Northend residents will receive intensive Financial Stability Coaching services and that an unspecified number of additional people will receive brief Information and Assistance services. The

core service of this RFP is Financial Stability Coaching. Bidders must demonstrate a history of effectively delivering services that include both personal case management as well as financial assistance. Staff identified in the Bidder's proposal must be fully dedicated to the FOC project. Staff assigned to this project will work under the direction of United North personnel. In addition, The United North Planning and Vision Committee will provide oversight of all FOC program operations and services.

LCDJFS and United North have mutually agreed upon the specifications for the site where FOC-based services will occur. The location must be centrally located in the Lagrange Village area of North Toledo. The site will need to have individual office/interview spaces as well as adequate group meeting space. It must meet all applicable requirements of the American's with Disabilities Act in regards to accessibility. The site must be available during regular business hours as well as evenings and weekends, offer adequate parking, and be located on or near a bus line. LCDJFS and UN must approve of the location prior to the commencement of services.

The Selected Bidder will be responsible for determining eligibility for all participants. LCDJFS will assist successful bidders in the proper determination of eligibility by providing training and ongoing technical assistance.

While United North will provide on site program supervision and direction, the Financial Coaches must receive routine employment supervision, benefits and support from their employer. This would include issues around work schedules (some evening and weekend hours may be required), job expectations/performance, and leave requests. It is expected that the Bidder will work closely with United North to anticipate and resolve any employment issues.

In addition, The United North Planning and Vision Committee will provide oversight of all FOC program operations and services. Effective partnerships and collaborations are essential to the effectiveness of a Financial Opportunity Center. The selected Bidder must be committed to working in an informed, respectful and cohesive manner with future FOC partners, both those located on site and those in the broader community.

## **B. Program Area Descriptions:**

### **1. Long Term Financial Stability Coaching**

Many families with limited incomes have personal hopes and goals of increasing their financial stability but the pressures of daily life and limited access to needed supports and services makes it difficult to move forward. The FOC brings those resources to the community in one convenient location. The Financial Stability Coaches are on site at the FOC and provides the ongoing encouragement and support that makes it easier for clients to stay on a consistent course and steadily build assets. The Financial Stability Coach:

1. Serves as the entry point to the full continuum of services offered by the FOC;
2. Works with the client to develop an Individualized Financial Stability Plan. This includes identifying both short and long term goals and strategies to move the client to financial stability. While some clients will need assistance with fixing immediate problems, the primary role of the coach is to help the client to create a vision of financial stability, to develop critical goals and steps and to hold the client accountable for achieving their goals;
3. Provides referrals to those resources identified in the client's Plan as well as any assistance needed by the client to access the resources;
4. Meets with the client on a frequent basis to assess progress, trouble shoot any challenges in accessing services and resources and to make any necessary adjustments to the Plan. Frequency of contact is dependent upon client need and it is anticipated that initially face to face contact will be on a weekly basis with phone and email contact as needed;
5. Schedules client contacts in a manner that supports the client's work schedule; and
6. Coordinates and arranges for on-site seminars on topics that assist clients with achieving goals (budgeting, debt reduction, savings programs etc).

## **2. Assistance with Accessing Public Benefits and Other Community Resources**

FOC clients are often employed but their wages and benefits are insufficient to meet their daily needs. They may also face housing issues and legal barriers that make it difficult to achieve their personal goals. While public benefits and helpful community resources may be available, the complexity of the system and lack of information on how to access services make it difficult for people to access benefits and services. Integral to the role of the Family Stability Coach is to support and enable access by:

1. Becoming trained Ohio Benefit Bank (OBB) counselors. The OBB offers electronic filing of federal and Ohio taxes, assistance with claiming federal tax credits, electronic applications for Food Assistance, Medicaid, Ohio Works First Cash Assistance, Child Care Subsidies and Low Income Home Energy Assistance. Training takes two days. For more information about OBB and training go to [www.obb.ohio.gov](http://www.obb.ohio.gov) ;
2. Maintaining current knowledge of available community resources and how to access them and establishing professional relationships with key community partners and referral sources;
3. Assisting clients with ensuring that needed arrangements are in place for any required interviews and appointments (transportation and child care plans etc); and
4. Following up with the client to make sure that application processes are completed including assisting with providing any needed documents.

## **3. Community Outreach**

While most services will be provided at the FOC, the Family Stability Coaches, under the direction of United North, will participate in community outreach events and activities for two purposes:

1. To assist with increasing neighborhood awareness of FOC resources; and
2. On a limited basis, provide coaching services at another community location due to exceptional client circumstances.
3. Provide Information and Referral Services to those community residents who do not need or seek the full services of the FOC but need some limited assistance in identifying community resources. I&R may be provided on site at the FOC on a walk-in basis or at community outreach activities.

## **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 LCDJFS via various types of formats such as text files, Microsoft Excel, Microsoft Word, Microsoft Access, or other formats as agreed upon by LCDJFS and Bidder.
- Have database backup capabilities of LCDJFS data and have a disaster recovery plan in the event that LCDJFS 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 LCDJFS data, written notification would be given and prior approval to any subcontract would be sought by Bidder(s) by LCDJFS.
- Must maintain current technology updates as required by LCDJFS in regard to Internet browser versions.
- Comply with LCDJFS requirements for providing a secure environment for LCDJFS data.
- Supply LCDJFS with reports or statistics for proposed project.
- Have properly working hardware and software to retrieve, import, and export LCDJFS data.
- Maintain an up to date anti-virus software program.

## Section 6. Application Format

### 6.1 Required Format Specifications

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 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 public agencies and other organizations in meaningful collaborative and/or partnership manner.

##### B3. Prior Successful Experiences with Target Population

- Use form provided
- Not to exceed two (2) 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 three (3) pages in length.
- The proposed program and service delivery model must respond to one of the areas described in Section 4.2 of 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.
- Collaborative partnerships, if used, should be operationally sound (See Section 6.3).
- 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) page in length.
- The Bidder should be able to demonstrate the ability to document, track, analyze data, and submit monthly and quarterly reports to LCDJFS.
- 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.

**6.3 Collaboration Letters**

LCDJFS strongly encourages Bidders to demonstrate collaborations and service linkages that would assist in achieving the objectives stated in Section 4.2 of this RFP.

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

**Please provide Letters of Support/Reference or Customer Survey results. Each Letter of Support must include:**

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

**(LCDJFS, 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 proposal:**

- 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, indicates 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.

**6.5 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.

## **6.5 B. Budget Form**

Complete LCDJFS Program Budget Form, which will be provided electronically upon request according to Section 7.1. 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 LCDJFS 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 5/12/2010 – 12/31/2010, 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 proposal. 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 proposal 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 proposal 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 proposal to LCDJFS. 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 LCDJFS 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 proposal 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 proposal 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 LCDJFS 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 LCDJFS 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 LCDJFS.

### **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 LCDJFS.

### **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 LCDJFS fund \$50,000 of a \$200,000 program, there should be \$50,000 listed under LCDJFS 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 LCCSEA.

**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.

**A signed original and seven (7) copies of the proposal along with the CD or flash drive version shall be submitted to LCDJFS as specified in Section 2.5 of this RFP.**

**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 of at least one of the submitted copies.**

**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 (Section 2.7 – 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](mailto: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 12:00 p.m., April 12, 2010 deadline. **NO REQUESTS FOR ATTACHMENTS WILL BE ACCEPTED AFTER 4:00 P.M., April 8, 2010.**

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 -- LCDJFS Performance Measures Form (Complete form through Line A)
10. Attachment 11 -- LCDJFS Budget Form

**Proposals submitted without the required affidavits attached will experience in a reduction in points during the Review Process. The original, notarized documents must be included as part of the “original” proposal packet as specified in Section 7.2 of the RFP. Bidders must include: one (1) signed original proposal, seven (7) copies and an electronic version of the document on a CD-ROM or flash drive in Word or PDF format and in Excel for applicable forms.**

#### **7.2 Application Checklist:**

- 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
- LCDJFS Performance Measures Form
- LCDJFS Budget Form
- Collaboration Letters
- Personnel Qualifications (including Alternate Signing Letter, if applicable)