

**REQUEST FOR PROPOSAL**

**FOR**

**WORKSFIRST PROGRAM**

**Issued by**

**THE LAKE COUNTY DEPARTMENT  
OF  
JOB & FAMILY SERVICES**

**177 Main Street  
Painesville, Ohio 44077**

**APRIL 29, 2016**

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**REQUEST FOR PROPOSAL  
FOR  
WORKSFIRST PROGRAM**

**1.0 GENERAL OVERVIEW**

**1.1 Introduction and Purpose**

The Lake County Department of Job and Family Services (LCDJFS) is requesting proposals for a WorksFirst Program to assist Lake County residents. The program will address the world of work (both in the classroom and real work settings to eliminate negative work behaviors and to provide participants with the ability to obtain employment or advance or adapt to the changing demands of the workplace) and soft skills (such as stress management, hygiene, time management, workplace behavior, work ethics, etc...). The program will also include working with participants to: establish realistic employment goals, identify strengths, conduct career research, and develop a plan to attain self-sufficiency. The program will service participants with little or no work experience whom may also have multiple barriers.

The participants must be determined eligible for the Prevention, Retention, and Contingency (PRC) Program, the Ohio Works First (OWF) Program, and/or Food Stamp Employment and Training (FSET). Participants may be non-English or limited English speaking. LCDJFS seeks to fund a program that will be readily accessible to participants in Lake County. Participants will be referred and assigned by LCDJFS.

Program design must promote self-sufficiency to sustain and maintain one's family. LCDJFS seeks to fund an innovative program that will be available and accessible to all geographic areas of Lake County. Proposers must demonstrate ability and experience in providing the proposed service.

**1.2 Procurement Schedule for RFP published June 6, 2014.**

|  |  |
|--|--|
| <b>All questions should be directed to:</b><br><a href="http://www.lakecountyohio.gov/omjlake/Home.aspx">http://www.lakecountyohio.gov/omjlake/Home.aspx</a> | <b>Date: Through May 18, 2016<br/>Noon EST</b> |
| <b>Deadline for Proposals Received at LCDJFS</b>   | <b>Date: May 20, 2016<br/>Noon EST</b>         |
| <b>Tentative Project Start-Up</b>  | <b>Date: July 1, 2016</b>                      |

**1.3 Proposal Delivery**

The contact person and mailing address to send or deliver proposals to:

**Robert J. Dawson, Executive Director  
Lake County Workforce Development Board  
177 Main Street  
Painesville, Ohio 44077**

Proposers should **mail or deliver** four (4) fully executed copies of the entire written proposal in a sealed envelope. **Any proposals received after Noon EST on May 20, 2016 will not be timely and will not be opened or considered.** Proposals cannot be accepted via fax or other electronic means.

The envelope containing the proposals must be clearly marked:  
"WorksFirst Program Proposal Enclosed"

## 2.0 REQUIREMENTS & SPECIFICATIONS

### 2.1 Description of Services

#### **Program Services:**

Program Services must include the following components within the 8 week training program:

- Orientation including Participant Compliance with Work Activity Hours
- Assessments
- Job Readiness Training
- Training in Customer Service and Microsoft Office Literacy
- Literacy Enhancement
- Intensive Case Management
- Work Experience
- Job Search
- Job Placement
- Job Retention for 90 days

The program operator will also be expected to participate in the Ohio Works Incentive Program (OWIP) when funding is available.

#### **Program Deliverables:**

**Orientation:** The Orientation should consist of staff introductions, reviewing the program, establishing expectations and performing appropriate assessments:

- Psychosocial
- Barriers to Employment Success Inventory (BESI)
- The Test of Adult Basic Education (TABE)
- Individual Employment Plan (IEP)

Orientations must be provided as needed based on client flow.

**Job Readiness Training:** Training topics should include world of work awareness and labor market knowledge. Also discussions of positive work habits, attitudes and behaviors such as punctuality, regular attendance, presenting a neat appearance, getting along and working well with others, exhibiting good conduct, following instructions and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability, and assuming the responsibilities involved in maintaining a job. This approach should entail developing motivation and adaptability, obtaining effective coping and problem solving skills, and acquiring an improved self-image. Classroom curriculum should involve videos, activities and internet research. Discussions on careers, career search and financial literacy should also be taught in this training. All activities need to be supervised and validated with participant signatures on a daily sign-in sheet.

*Participant Capacity:* Classes must be scheduled with weekly start dates to accommodate as many participant referrals as possible. Programs must be able to serve as many as 50 participants when needed. The preferred proposal must be designed to handle flexible numbers of participants continual start stop dates through-out the program year (July 1<sup>st</sup> – June 30<sup>th</sup>).

*Curriculum:* The curriculum must be structured into a flexible rotation of eight weekly segments. This will allow for weekly start dates and will accommodate participants entering the program on any given week. Each participant should receive the full eight week curriculum but not necessarily in the same order.

**Customer Service:** The Customer Service component should consist of the curriculum provided by the National Retail Federation (NRF) Foundation and include classroom discussions and activities. Communicating effectively, teamwork and understanding the customer's point of view are a few of the skills that should be taught and learned. The National Professional Service Certification in Customer Service signifies that the person who earns this credential has demonstrated knowledge and skills noted as important to successful employment in best practice, high performance companies in sales and service industries. Participants will be expected to pass the on-line test to receive the National Professional Certification. In the event of a failure on the exam, the NRF test results will specifically identify the areas of weakness in which the client scored too low. With additional instruction and review of the curriculum, the client will be expected to retake the exam.

**Microsoft Office Literacy:** Microsoft Office Literacy training should be offered including basic computer skills, Microsoft Word and Microsoft Excel programs. The goal for each participant receiving computer training should be the attainment of a Microsoft Literacy Certificate.

**Literacy Enhancement:** This service must be made available as needed and instruction should be driven by the results of the TABE given at orientation. Basic math and reading instruction can be delivered in a group setting with individual assistance as needed.

**Intensive Case Management:** Intensive outreach should be continuously provided throughout the entire program to ensure participation hours are being met, to assist with barrier removal, to provide support and community linkages. Each participant should receive group and individual services as needed. Case management contacts should include telephone calls, home, community, worksite and employer visits. Progress notes should be completed for each case management service provided. A Case Manager must update IEPs on a regular basis, not less than monthly. Case Management services should be available based on individual participant needs.

**Work Experience:** All participants shall have the opportunity to participate on work experience as needed. Participants should have a formal performance evaluation completed by the worksite supervisor which designed to indicate strengths and areas still in need of improvement. Worksite supervisors should be expected to submit attendance on a weekly basis to program staff and case notes should document all performance information.

**Job Search:** Job Search should be scheduled for four weeks directly following Job Readiness and last until the participant secures full time employment. The Employer Recruiter/Job Developer should be an active member during these four weeks directly working with participants and assisting them with Job Search activities. These consist of applying and searching for jobs on-line, applying in person, attending job fairs, following up on applications, etc. All activities will be supervised and validated with participant signatures on a daily sign in sheet.

**Job Placement:** Job Placement is defined as unsubsidized employment for a minimum of 30 hours per week as documented by an employer. An Employment Specialist and/or Job Developer will need to have the employer verify employment hire date, start date, wage, benefits and retention days via a signed verification form. Pay stubs can also be submitted to verify employment.

**Job Retention:** Job Retention begins the first day a participant becomes employed and lasts through (at least) 90 days of employment. At a minimum, this effort should consist of intensive visits to the employer, the participant's home and possibly involve community visits. Case notes should detail all retention efforts, successes and areas of concern. During Job Retention the IEP should be monitored.

**Program Schedule:** The program schedule must be flexible and allow for 20-35 hours per week in order for a participant to meet their required work activity hours as specified in their Self-Sufficiency Plan. The weekly class schedule shall be Monday – Thursday with Friday designated as a make-up day for material missed during the week **for good cause absences only**.

The program schedule is as follows:

Weeks 1-4:

- Microsoft Office Literacy
- Job Readiness including Customer Service
- Literacy Enhancement (if applicable)

Weeks 5-8:

- Work Experience
- Job Search
- Literacy Enhancement (if applicable)

Job Retention will immediately follow job placement for a minimum of 90 days.

**Incentives:** *Incentive* stipends should be paid to participants when they accomplish certain milestones that are deemed paramount to their success. At a minimum, proposers must adequately budget for an appropriate incentive schedule that includes a participant attaining Microsoft Literacy Certificate, their achievement of a Customer Service Certificate and upon their accomplishment of their GED, if applicable.

**Supportive Services:** Clients should receive supportive services as required to seek and secure employment. These services may include but are not limited to such things as clothing and accessories for interviews, dress shoes, undergarments, uniforms, work shoes and/or safety goggles. Every client that secures employment will be entitled to a one- time \$100 Job Retention Stipend designed to prevent absences on the job. The maximum amount of Supportive Services to be paid to any one client shall be \$250.00 (including the job retention stipend).

**Program Performance:** The following outcomes will be tracked and reported:

| <b><u>Outcome</u></b>  | <b><u>Goal</u></b>   |
|--|--|
| Percentage of participants complying with their participation requirements | 80% should comply with their participation requirements verified by signed attendance sheets                   |
| Completion of Work Experience  | 80% of participants who complete Job Readiness should complete Work Experience and/or fast track to employment |
| Attainment of Customer Service Certificate                                 | 80% of participants who take the Customer Service test should attain a Customer Service Certificate.           |
| Attainment of Microsoft Literacy Certificate                               | 80% of participants who begin Job Readiness should will attain a Microsoft Literacy Certificate                |
| Job Placement  | 70% of participants should obtain full time employment.  |
| 90 Day Job Retention   | 60% of participants should retain employment for 90 days or longer   |
| GED Obtainment   | 50% of those taking the GED will pass the test.  |

## **2.2 Vendor Project Requirements**

The Vendor shall meet all requirements in the following Conditions of Participation and Service Specifications. Vendor must identify a means to measure program performance. One performance measurement must be participants' meeting their work activity participation rate as required for OWF or FSET.

### **A. Conditions of Participation**

Service Vendor shall meet these conditions of participation:

1. Be a formally organized business or service agency providing the services applied for, and shall:
  - Disclose all entities with a five percent or more ownership, and have a written statement defining the purpose of the business or service agency.
  - Have a written statement of policies and directives, bylaws, or articles of incorporation.
  - Have a written table of organization that clearly identifies lines of administrative, advisory, contractual, and supervisory authority unless the business is a sole proprietorship.
  - Operate the business in compliance with all applicable federal, state, and local laws, and shall have a written statement supporting compliance with:
    - (1) non-discrimination laws, federal wage and hour laws, and workers' compensation laws in the recruitment and employment of individuals
    - (2) non-discrimination laws in the provision of services; and
    - (3) Federal rules and statutes take precedence over these conditions in cases where discrepancies between these exist.
  - Have a written affirmative action plan that must be appropriately updated, and will be reviewed at least annually.
  - Comply with all Federal, State of Ohio, and local laws, rules, executive orders and other legal requirements as they apply to the work experience programs including drug abuse and alcohol misuse requirements as appropriate.
2. Have physical facilities from which to conduct business which provides a professional environment that is conducive to learning. These facilities should have a telephone, internet access for email purposes, and a designated and utilized locked storage space for the maintenance of participant records, and email access to correspond with LCDJFS.
3. Have written procedures supporting the operation of the business and provision of service, and shall:
  - a. Have a system to document services delivered, billed, and reimbursed that complies with service specifications.
  - b. Provide evidence supporting financial responsibility in the coverage of participant loss due to theft, property damage, or personal injury, and have a written procedure which identifies the steps a participant must take to file a liability claim.
  - c. Have a written procedure for reporting and documenting all participant incidents including significant changes that affect service delivery or imminent health or safety risks.
  - d. Maintain a file for each participant. Each file shall include this identifying data:
    - Participant's name, address, and telephone number;
    - Participant's date of birth and gender;
    - Participant's case number assigned by LCDJFS;
    - Service Vendor's contact person and telephone number;
    - Initial referral form from LCDJFS; and
    - Additional demographic data requested by the LCDJFS such as ongoing documentation of participant progress.
  - e. Maintain documentation of each participant contact and each service delivered.
  - f. Obtain written approval from the participant to release participant information.

- g. Retain all participant records for at least three years or until an audit is completed, and all exceptions resolved, whichever is later.
  - h. Have a written procedure for follow-up and investigation of participant complaints and grievances, and a method to inform participants at the inception of services of the contact number for the resolution contact.
4. Have written personnel policies and documentation that support personnel practices which include:
    - a. Job descriptions or statement of job responsibilities, including qualifications for each position involved in the delivery of services unless the business is a sole proprietorship.
    - b. Performance appraisals or a development plan for all employed or contract workers, and volunteers involved in providing service to participants unless the business is a sole proprietorship.
    - c. Prior to service provision, a Vendor staff signature and a date that indicates completion of orientation that includes:
      - Employee position description and expectations,
      - Personnel policies,
      - Reporting procedures and policies, and
      - Table of organization and lines of communication.
      - A code of ethics which declares that the Vendor staff shall not:
        1. Consume alcoholic beverages or use medicine or drugs for any purpose other than medical while in the presence of the participant or prior to the delivery of service
        2. Smoke in the presence of the participant with, or without, the participant's permission
        3. Breach the participant's privacy or the confidentiality of participant records
  5. Assure that all participant information will remain confidential.
  6. Deliver services in compliance with Service Specification (see B below) practices for Vendors.
  7. Sign a contract with the LCDJFS for program services and the Vendor shall:
    - a. Maintain documentation demonstrating that all requirements outlined in service specifications have been met when delivered either directly or by sub-contract;
    - b. Allow access to LCDJFS and to other representatives with a need to access the Vendor's facility, policies, procedures, records and other documents related to the provision of services;
    - c. Demonstrate compliance regarding background investigations of direct service workers.
  8. Failure to meet any of the requirements of these conditions may lead to the termination of the LCDJFS contract with the service Vendor.

**B. Service Specifications**

Proposers must submit a detailed description of how the program specifications will be fulfilled. The descriptions should demonstrate that the proposer understands the program as described in this RFP. Proposers must describe their monitoring system and list the objectives of the proposed service. Proposers must provide a detailed description of how their project will contribute to the needs of OWF and/or FSET eligible participants.

1. Service Vendor Requirements:

- a. The Vendor must be able to deliver services 52 weeks per year.
- b. The Vendor shall work with participants to insure their compliance with participation rates required of OWF and/or FSET

- c. Vendor will provide services that help develop good habits and eliminate behaviors that are unacceptable in a work setting such as tardiness, poor hygiene, etc.
- d. The Vendor shall maintain a participant record of each service provided and ongoing documentation of participant progress.
- e. The Vendor shall document that the staff member or volunteer providing a participant service successfully completes a training program appropriate to the service being provided, prior to service provision.

2. Unit of Service:

- a. The unit of service is to be defined by the proposer based on their individualized program. If the proposer is selected for a contract, LCDJFS may negotiate the terms of the unit rate if necessary.
- b. The unit rate shall include all costs associated with the program including administrative, training and record documentation time.

**C. Applicable Laws and Rules**

Service Vendors shall understand, agree with, and comply with the following:

- 1. American's with Disabilities Act of 1990
- 2. Occupational Safety and Health Act of 1970
- 3. Equal Employment Opportunity Act
- 4. Clean Air Act, as amended, 42 USC §§ AA 7401 et seq. If contract amount exceeds \$100,000
- 5. Certify that no funds appropriated by the contract will be used for lobbying ads described in 31 USC 1352. If contract amount exceeds \$100,000 the selected Vendor shall submit a "Certification Regarding Lobbying" as required by 49 CFR part 20.
- 6. The Vendor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency. If the contract amount exceeds \$100,000, the Vendor shall submit an "Integrity Certification" regarding debarment, suspension, and other responsible matters.
- 7. Affidavit of Compliance with O.R.C. 3517.13: Political Contribution Limitations (501(C)(3) exempt)
- 8. Ohio Revised Code - All laws and regulations pertaining to the services provided
- 9. Declaration Regarding Material Assistance/Non-assistance to a Terrorist Organization- DMA is a provision of Senate Bill 9, which is Ohio's homeland security and anti-terrorism legislation. Sections 2909.32, 2909.33, and 2909.34 of the Ohio Revised Code officially define DMA.

**2.3 Required Documents**

If not currently an active vendor with Lake County Job & Family Services, Proposers shall submit the following with their proposal:

- A. Most Recent Financial Report
- B. Most Recent Audit
- C. Articles of Incorporation
- D. Proof of Liability Insurance/Other Required Insurance
- E. Equal Employment Opportunity - Affirmative Action Plan
- F. Professional or Operating licenses
- G. Documents used for monitoring goals and outcomes

**2.4 Narrative**

Proposers must complete descriptions of their program, services, and personnel information. (Attachment B)

- A. Program description and proposed service
- B. Summary of services
- C. Explanation of Program location and description of facility
- D. Limitations in meeting conditions of contract
- E. Organizational structure
- F. Job duties of Program Director
- G. Job description(s) of program personnel
- H. List of current or previous programs performed of a similar type
- I. Participant capacity

### **3.0 SUBMISSION OF PROPOSAL**

#### **3.1 Preparation of Proposal**

Proposals must provide a straightforward, concise and clearly delineate qualifications, capabilities, and experience to satisfy the requirements of the RFP. Expensive binding, colored displays, promotional materials and the like are not necessary or desired. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, completeness and clarity of content. The proposal must include all costs that relate to services submitted. Proposals must be easily reproduced, on quality paper, single spaced, clearly formatted using Times Roman (or similar), 12 point font. All proposed and associated documents will be considered to be public information and will be open for inspection to interested parties unless identified and established as proprietary.

#### **3.2 Proposal Cost**

The costs of developing proposals are entirely the responsibility of the Proposer and shall not be chargeable to LCDJFS under any circumstances. All materials submitted in response to the RFP will become the property of LCDJFS.

#### **3.3 Proposers Signature**

The proposal shall be signed by an individual who is authorized to bind the Proposer contractually. The signature must indicate the title or position the individual holds in the Proposer's organization. **Any and all unsigned proposals will be rejected.**

#### **3.4 Proposal Format**

To expedite and simplify the process for evaluating proposals, and to assure each proposal receives the same orderly review, it is required that all proposals be submitted in the format as described in this section. Proposals shall contain all the elements of information specified without exception. Proposal sections must be numbered corresponding to the following format:

- Section 1 – Proposers' Overview (Attachment A)
- Section 2 – Required documents in order listed in Section 2.3
- Section 3 – Narrative as addressed in Section 2.4 (Attachment B)
- Section 4 - Budget (Attachment C)
- Section 5 – Signature Page (Attachment D)

#### **3.5 Acceptance and Rejection of Proposals**

LCDJFS reserves the right to:

- award a proposal based on individual items, or on the entire list of items
- reject any or all proposals, or any part thereof
- waive any informality in the proposals

The decision of the LCDJFS and the Lake County Commissioners shall be final. The waiver of an immaterial defect shall in no way modify the RFP documents or excuse the Proposer from full compliance with its specifications if the Proposer is awarded a contract.

### **3.6 Evaluation and Award of Contract**

The review process will be conducted in two (2) stages. Stage 1 will consist of a preliminary review to ensure that the proposal materials adhere to the minimum requirements and mandatory conditions specified in the RFP. Proposals which adhere to the minimum requirements will be deemed "Qualified". Those which do not meet the minimum will be deemed "Non-Qualified". "Non-Qualified" proposals will be placed in an inactive file. Partial submissions, or proposals submitted after the designated deadline, will be determined to be non-responsive and will be "Non-Qualified".

"Qualified" proposals will then be reviewed in Stage 2, in accordance with the review process.

#### **A. Stage 1 Review:**

"Qualified" proposals in response to the RFP must meet the following requirements:

1. **Timely Submission - The proposal must be received at the address designated in the RFP by Friday, May 20, 2016 at Noon EST and according to instructions. Proposals mailed but not received at the designated location by the specified date will be deemed "Non-Qualified" and will not be considered.**
2. **Completeness of Submission - proposal submission must include at minimum:**
  - a. Timely Submission of the Proposal.
  - b. Four (4) complete sets of the Proposal
  - c. All sections defined in Section 3.4 Proposal Format.
  - d. All designated Attachments including signed Signature Page (Attachment D)
  - e. Determination the proposal meets minimum qualifications outlined in this RFP.

**PROPOSALS WHICH DO NOT MEET ALL OF THE ABOVE FIRST STAGE REVIEW SUBMISSION REQUIREMENTS WILL BE DEEMED "NON-QUALIFIED" AND WILL NOT BE REVIEWED FOR STAGE 2.**

#### **B. Stage 2 Review**

All "Qualified" proposals will be reviewed, evaluated, and rated. At any time during the review, and at any level of the review, LCDJFS may request additional information from the Proposer. All information obtained will be used in conjunction with the data from Stages 1 and 2 to make a final selection. The evaluation will include, but will not be limited to:

- strength and stability of the Proposer to provide the requested services;
- ability to meet the project time lines;
- overall responsiveness, viability and completeness of the proposal as well as the likelihood that in LCDJFS's opinion and at LCDJFS's discretion, the proposal best meets or exceeds LCDJFS's specifications;
- general information from Narrative;
- personnel qualifications;
- distinguishing characteristics;
- cost of proposed service;
- any other facts considered relevant by LCDJFS; and
- success in operating the same or similar programs.

### **3.7 Proposal Selection**

The selection of one Proposer shall be based upon the results of the Stage 1 and Stage 2 evaluations and may result in the issuance of a contract. A Proposer's selection does not guarantee a contract for services will be awarded. If LCDJFS and the Proposer are unable to successfully come to terms regarding a contract, LCDJFS reserves the right to terminate contract discussions without cause. In this event, LCDJFS reserves the right to select another Proposer from the process, cancel the RFP, or reissue the RFP if this is deemed necessary.

### **3.8 Post Selection Meeting**

The post-selection meeting may be utilized only by "Qualified" Proposers passing the first level review, who wish to obtain clarifying information regarding their non-selection. If a Vendor wishes to discuss the selection process, the request for an informal meeting and the explanation for it must be submitted in writing within five business days of the receipt of the non-selection notice. The request for a meeting should be sent to Robert J. Dawson at the address given in Section 1.3.

## **4.0 TERMS AND CONDITIONS**

### **4.1 Contract Overview**

The contract shall incorporate the terms, conditions and requirements of the RFP, the Vendor's proposal, and all other agreements that may be reached. LCDJFS will design, develop, and implement the structure of the contract. The successful Vendor's proposal, this RFP, and any applicable addendums will become part of the final contract.

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

A contract will be written for an initial contract period that is determined reasonable by LCDJFS, with the option to renew for an additional contract year based on performance and available funding. The contract has a tentative effective date of July 1, 2016 with the initial contract period running through June 30, 2017. Subject to change, Vendor(s) will submit a detailed invoice to LCDJFS on a monthly basis in a format approved by LCDJFS. Payments will be made based upon a negotiated unit rate. Vendor(s) will report actual expenses monthly in a format approved by LCDJFS. Payments will be reconciled periodically to ensure that total payments do not exceed actual expenses.

### **4.3 Availability of Funds**

LCDJFS reserves the right to not award all or any of the funding available through this request for proposals process, based on available funding, and/or the quality of the proposals submitted. LCDJFS is under no obligation to compensate the Vendor for any expenses incurred as a result of the RFP process. Costs for the requested service shall not exceed \$450,000 annually.

### **4.4 Patent or Copyright Liabilities**

The Vendor will protect, defend and hold free and harmless LCDJFS, Lake County, its officers, employees, agents, and Board of County Commissioners against all claims that any of the designs supplied hereunder infringe a U.S. patent or copyright. The Vendor will pay all resulting costs, damages, and attorney's fees to defend Lake County against such claims. LCDJFS will promptly notify the Vendor in writing of all claims, and the Vendor will have control of the defense and all related settlement negotiations. If such claim has occurred, or is likely to occur, LCDJFS agrees to permit the Vendor, at Vendor's option and expense, either to procure for LCDJFS the right to continue using the designs or programming or to replace or modify the same so that they become non-infringing but still meet the requirements of the RFP.

### **4.5 Confidentiality and Security**

Any Vendor engaging in any service for LCDJFS requiring them to come into contact with confidential LCDJFS information will be required to hold confidential such data made available to them.

#### **4.6 Software and Ownership Rights**

LCDJFS will have ownership rights in software, software modifications, and associated documentation designed, developed, or installed with the use of County funds. LCDJFS reserves a royalty-free, nonexclusive and irrevocable license to reproduce, publish, or otherwise use and authorize others to use the software, software modifications and documentation for County, State, and Federal government purposes (edited APM.4046.(5)).

#### **4.7 Publicity**

Any program descriptions, publicity releases, or other public references including but not limited to, both internal and external informational pamphlets, brochures, and media releases on the services provided under this agreement will clearly state that the services are funded with TANF funds through LCDJFS. **The Vendor assumes responsibility for the development and cost associated with these items and agrees to obtain approval from LCDJFS before releasing promotional materials and/or items.**

**ATTACHMENT A  
WORKSFIRST TRAINING PROGRAM  
PROPOSAL SUMMARY**

ORGANIZATION NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

SERVICE SITE (if different): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

FEDERAL TAX I.D. NUMBER: \_\_\_\_\_

EXECUTIVE DIRECTOR/DIRECTOR: \_\_\_\_\_

PROGRAM COORDINATOR: \_\_\_\_\_ EMAIL: \_\_\_\_\_

FISCAL CONTACT: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**TERMS AND CONDITIONS**

It is understood and agreed upon by the undersigned authorized individual that: Funds granted as a result of this request are to be extended for the purposes set forth and in accordance with all applicable laws, regulations, policies and procedures of this State, County, and the Lake County Department of Job and Family Services (LCDJFS). Any proposed changes in the proposal as approved will be submitted in writing by the applicant and upon notification of approval by the LCDJFS shall be deemed incorporated into and become a part of this agreement. This request for the proposal is being issued on the basis of the presumed availability of funds. LCDJFS will not be liable should funds be eliminated or reduced. Completion of a proposal does not imply that LCDJFS will fund a proposal. Proposals are subject to review by representatives of LCDJFS. At its sole discretion, LCDJFS may negotiate the unit price, or any other factors, prior to determining to enter or not to enter into contract based on a proposal.

**ATTACHMENT B**  
**WORKSFIRST TRAINING PROGRAM**  
**PROGRAM NARRATIVE**

Proposers must complete descriptions as requested below; each description should be specific and brief, but comprehensive. Proposers should complete all sections.

- A. Program Description:**
1. Provide a detailed description of how the program specifications will be fulfilled. The description should demonstrate that the Proposer understands the program as described in the RFP. Proposers must describe their monitoring system and list the objectives of the proposed service.
- B. Summary of Service:** Provide a summary (in separate paragraphs) of service and description for each of these areas:
1. Days and hours service is available
  2. The facilities and addresses from which the service will be provided
  3. How will the Contractor coordinate this service with other programs
  4. The level of experience the Vendor has in providing the service
  5. Letters of support or cooperation from other Vendor agencies that relate to this project
- C. Limitations:** Describe any limitations the Proposer will have in meeting the conditions of participation, service specification standards, and terms of the contract for this service.
- D. Organizational Structure:** State briefly the history of the Proposer's organization. Include date of incorporation and include the main source of financial support. (Attach organizational chart)
- E. Job Duties of Project Director:** Document to whom the Proposers Project Director reports, list job duties of the Project Director along with percentage of time spent on the proposed project. (Attach job description with minimum education, training and work experience required.)
- F. Job Duties of Project Personnel:** Provide a brief description of duties for each position in the proposal along with any specific training required for each. (Attach job descriptions)



**G. A. Salaries**

| Position Title        | # of Positions Requested | Annual Salary | Hours per Week | % of Time to Entire Program | % of Time to Project | Program Salary | Project Salaries |
|-----------------------|--------------------------|---------------|----------------|-----------------------------|----------------------|----------------|------------------|
|                       |                          |               |                |                             |                      |                |                  |
|                       |                          |               |                |                             |                      |                |                  |
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|                       |                          |               |                |                             |                      |                |                  |
| <b>Total Salaries</b> |                          |               |                |                             |                      |                |                  |

**I. B. Payroll-Related Expenses**

| Item   | Total Estimated Amount | Estimated Amount to Lake County |
|--|------------------------|---------------------------------|
| PERS or Social Security                      |                        |                                 |
| Worker's Compensation/Unemployment Insurance |                        |                                 |
| Retirement Expenses                          |                        |                                 |
| Hospitalization                              |                        |                                 |
| Other ( <i>identify</i> )                    |                        |                                 |
|  |                        |                                 |
|  |                        |                                 |
| <b>Total Payroll-Related Expenses</b>        |                        |                                 |

**II. A. Travel and Short-Term Training**

|   | Total | Total to Lake County |
|---|-------|----------------------|
| Mileage Reimbursement (_____ per mile)      |       |                      |
| Short-Term Training                         |       |                      |
| <b>Total Travel and Short-Term Training</b> |       |                      |

**II. B. Consumable Supplies**

| Type                             | Total | Total to Lake County |
|----------------------------------|-------|----------------------|
| Office Supplies                  |       |                      |
| Cleaning Supplies                |       |                      |
| Other ( <i>identify</i> )        |       |                      |
| <b>Total Consumable Supplies</b> |       |                      |

**II. C. Occupancy Costs**

|  | Total | Total to Lake County |
|--|-------|----------------------|
| Rental @ _____ per square foot<br><b>or</b>  |       |                      |
| Usage allowance/depreciation @ _____ % rate of original acquisition cost of _____ by Program Square Footage Percentage (Program Square Footage divided by Vendor Square Footage _____ = _____ %) |       |                      |
| Maintenance and Repairs  |       |                      |
| Utilities (if not included in rent)<br>Heat and Light _____<br>Telephone _____<br>Water _____  |       |                      |
| <b>Total Occupancy Costs</b>   |       |                      |

**II. D. Contract & Professional Services - Consulting, System Support, etc.**

| Identify Each Contract of Service          | Total | Total to Lake County |
|--|-------|----------------------|
|  |       |                      |
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|  |       |                      |
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|  |       |                      |
|  |       |                      |
| <b>Total Contract &amp; Services Costs</b> |       |                      |

**II. E. Other- Miscellaneous**

| Identify Miscellaneous Costs     | Total | Total to Lake County |
|----------------------------------|-------|----------------------|
|                                  |       |                      |
|                                  |       |                      |
|                                  |       |                      |
|                                  |       |                      |
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|                                  |       |                      |
| <b>Total Miscellaneous Costs</b> |       |                      |

**III. A. Equipment Subject to Depreciation**

| Equipment to be Depreciated<br>(1)          | New or Used<br>(2) | Date Purchased<br>(3) | Quantity<br>(4) | Total Actual Cost<br>(5) | Salvage Value<br>(6) | Amount to be Depreciated<br>(7) | Useful Life<br>(8) | Total Chargeable Annual Depreciation<br>(9) | Chargeable Annual Depreciation to Lake County<br>(10) |
|---|--------------------|-----------------------|-----------------|--------------------------|----------------------|---------------------------------|--------------------|---|---|
|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
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|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
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|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
|   |                    |                       |                 |                          |                      |                                 |                    |   |   |
| <b>Total Equipment Depreciation Charges</b> |                    |                       |                 |                          |                      |                                 |                    |   |   |

**III. B. Small Equipment Purchases (Equipment costing under \$25,000)**

| Item                                   | Quantity | Total | Total to Lake County |
|--|----------|-------|----------------------|
|  |          |       |                      |
|  |          |       |                      |
|  |          |       |                      |
|  |          |       |                      |
| <b>Total Small Equipment Purchases</b> |          |       |                      |

**III. C. Leased and Rented Equipment**

| Item                                     | Model and Year | Quantity | Total | Total to Lake County |
|--|----------------|----------|-------|----------------------|
|  |                |          |       |                      |
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|  |                |          |       |                      |
|  |                |          |       |                      |
| <b>Total Leased and Rented Equipment</b> |                |          |       |                      |

**IV. MINUS Other Program Resources**

| Resource  | Total | Total to Lake County |
|---|-------|----------------------|
| Federated Organizations (Catholic Charities, United Way, Government Grants, Contracts...) |       |                      |
|   |       |                      |
|   |       |                      |
|   |       |                      |
|   |       |                      |
| <b>Total Program Resources</b>  |       |                      |

**ATTACHMENT D  
WORKSFIRST TRAINING PROGRAM  
SIGNATURE PAGE**

I hereby certify the following:

- I have reviewed the completed Request for Proposal and am in full agreement with its content, including all Specifications.

I possess the legal authority to represent:

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(Typed Name of Proposer Organization)

- The Proposer possesses legal authority to submit the Request for Proposal and to enter a contract with the Lake County Board of Commissioners.
- A resolution, motion, or similar action has been duly adopted or passed as an official act of the Proposer's governing body, authorizing the submission of the Request for Proposal, including all understandings and assurances contained therein, and directing and authorizing the person(s) identified as the official representative(s) of the Proposer to act in connection with the Request for Proposal, to provide such additional information as may be required, and to bind the Proposer to this Request for Proposal and to future contracts, agreements, provisions, and/or conditions relating to the Request for Proposal and any subsequent contract.
- All information presented in this Request for Proposal is true and correct, and shall be open to verification by the Lake County Department of Job and Family Services.
- All projected costs are reasonable and necessary for the proposed program, activity, and/or service, and the TANF funds requested do not duplicate other funds already available, or which will be available, to pay the projected costs. All cost and price information submitted with the Request for Proposal is accurate, complete, and based on current data at the time of submission.
- Should this Request for Proposal be approved, the Proposer agrees to abide all local and state policies and all applicable laws.

**SIGNATURE OF CHIEF EXECUTIVE OFFICER/AUTHORIZED REPRESENTATIVE**

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(Signature)

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(Typed Name and Title)

(Typed Date)