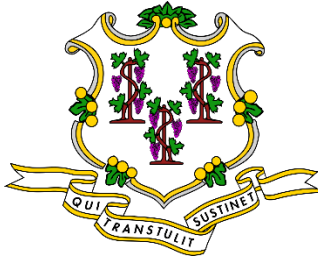


STATE OF CONNECTICUT PROCUREMENT NOTICE



Request for Proposals (RFP) For
SDE – Consultative Services on Remote Learning
RFP Name: Remote Learning Commission Consultative
Services #832

Issued By:

Connecticut State Department of Education

November 1, 2021

The Request for Proposal is available in electronic format on the State Contracting Portal by filtering by Organization for Connecticut State Department of Education

<https://portal.ct.gov/DAS/CTSource/BidBoard>

or from the Agency's Official Contact:

Name: Irene E. Parisi
Address: 450 Columbus Blvd., Hartford, CT 06103
Phone: 860-713-6823
E-Mail: Irene.Parisi@ct.gov

The RFP is also available on the Agency's website at [RFPs \(ct.gov\)](https://portal.ct.gov/DAS/CTSource/BidBoard).

RESPONSES MUST BE RECEIVED NO LATER THAN

November 12 2021

At Time 5:00 P.M. EST

The State Department of Education is an Equal Opportunity/Affirmative Action Employer.

The State Department of Education reserves the right to reject any and all submissions or cancel this procurement at any time if deemed in the best interest of the State of Connecticut (State).

TABLE OF CONTENTS

	Page
Section I — GENERAL INFORMATION	3
A. Introduction	3
B. Instructions	3
Section II — PURPOSE OF RFP AND SCOPE OF SERVICES.	6
A. Agency Overview	6
B. Service Overview	6
C. Scope of Services Description.	7
D. Performance Measures	8
E. Contract Management/Data Reporting	9
Section III — PROPOSAL SUBMISSION OVERVIEW	9
A. Submission Format Information	9
B. Evaluation of Proposals	11
Section IV — PROPOSAL SUBMISSION OUTLINE AND REQUIREMENTS	13
A. Cover Sheet	14
B. Table of Contents.	14
C. Executive Summary	14
D. Main Proposal Submission Questions	14
E. Attachments	16
F. Declaration of Confidential Information	16
G. Conflict of Interest – Disclosure Statement.	16
H. Statement of Assurances	16
Section V — MANDATORY PROVISIONS	17
A. Standard Contract Provisions	17
B. Assurances	17
C. Terms and Conditions	17
D. Rights Reserved to the State	18
E. Statutory and Regulatory Compliance	19
Section VI — APPENDIX	23
A. Abbreviations / Acronyms / Definitions	23
B. Statement of Assurances	24
C. Proposal Checklist	25

I. GENERAL INFORMATION

■ A. INTRODUCTION

- 1. RFP Name and Number.** Remote Learning Commission Consultative Services #832
- 2. RFP Summary.** Pursuant to Senate Bill 1202, Public Act 21-2, Sec. 387 and 388 the Connecticut State Department of Education (CSDE) shall establish a Remote Learning Commission to analyze and provide recommendations concerning the provision of remote learning to public school students enrolled in grades kindergarten to twelve. The CSDE is seeking a provider/vendor to conduct an analysis of the feasibility of a statewide K-12 Remote Learning School and provide recommendations. The provider/vendor will facilitate the commission meetings, and discussion, conduct a national scan of remote learning schools, and in consultation with the commission design, develop and submit a report that includes an analysis and recommendations.
- 3. RFP Purpose.** The Connecticut State Department of Education (CSDE) is seeking submission of written proposals, on a competitive basis, from qualified organizations to partner with the CSDE in the co-facilitation of the Remote Learning Commission meetings and discussion to conduct a national scan of remote learning schools, and to design, develop and submit a report on findings the feasibility of the Statewide K-12 Remote Learning School. The CSDE is soliciting providers/vendors to provide consultative services to advise, develop and deliver a feasibility study on a Remote Learning School to the Commissioner of Education.
- 4. Commodity Codes.** The services that the Agency wishes to procure through this RFP are as follows:

86000000: Education and Training Services

■ B. INSTRUCTIONS

- 1. Official Contact.** The Agency has designated the individual below as the Official Contact for purposes of this RFP. The Official Contact is the **only authorized contact** for this procurement and, as such, handles all related communications on behalf of the Agency. Proposers, prospective proposers, and other interested parties are advised that any communication with any other Agency employee(s) (including appointed officials) or personnel under contract to the Agency about this RFP is strictly prohibited. Proposers or prospective proposers who violate this instruction may risk disqualification from further consideration.

Name: Irene E. Parisi, Chief Academic Officer
Address: 450 Columbus Blvd. Hartford, CT 06103
Phone: 860-713-6852
E-Mail: Irene.Parisi@ct.gov

Please ensure that e-mail screening software (if used) recognizes and accepts e-mails from the Official Contact.

2. Registering with State Contracting Portal. Respondents must register with the State of CT contracting portal at <https://portal.ct.gov/DAS/CTSource/Registration> if not already registered. Respondents shall submit the following information pertaining to this application to this portal (on their supplier profile), which will be checked by the Agency contact.

- Secretary of State recognition – Click on appropriate response
- Non-profit status, if applicable
- Notification to Bidders, Parts I-V
- Campaign Contribution Certification (OPM Ethics Form 1):
<https://portal.ct.gov/OPM/Fin-PSA/Forms/Ethics-Forms>

3. RFP Information. The RFP, amendments to the RFP, and other information associated with this procurement are available in electronic format from the Official Contact or from the Internet at the following locations:

- Agency’s RFP Web Page
<https://portal.ct.gov/SDE/RFP/Request-for-Proposals/2021-RFPs>
- State Contracting Portal (go to CTsource bid board, filter by CSDE)
<https://portal.ct.gov/DAS/CTSource/BidBoard>

It is strongly recommended that any proposer or prospective proposer interested in this procurement check the Bid Board for any solicitation changes. Interested proposers may receive additional e-mails from CTsource announcing addendums that are posted on the portal. This service is provided as a courtesy to assist in monitoring activities associated with State procurements, including this RFP.

4. Procurement Schedule. See below. Dates after the due date for proposals (“Proposals Due”) are non-binding target dates only (*). The Agency may amend the schedule as needed. Any change to non-target dates will be made by means of an amendment to this RFP and will be posted on the State Contracting Portal and, if available, the Agency’s RFP Web Page.

- RFP Released: November 1, 2021
- RFP Conference: Not Applicable
- Letter of Intent Due: Not Applicable
- Deadline for Questions: November 5, 2021
- Answers Released: Answers released on a rolling basis
- Proposals Due: November 12, 2021 by 5:00pm

5. Contract Awards. The award of any contract pursuant to this RFP is dependent upon the availability of funding to the Agency. The Agency anticipates the following:

- Total Funding Available: \$150,000
- Number of Awards: One
- Contract Term: Upon award of contract through July 1, 2023
- Funding Source: GEER

6. Eligibility. To be eligible for evaluation, proposals must (1) be received on or before the due date and time; (2) meet the Proposal requirements; and (3) be complete. Proposals that fail to follow instructions or satisfy the minimum submission requirements (Section IV), may be deemed ineligible for further review. CSDE reserves the right to accept or reject any proposal that deviates significantly from the requirements of this RFP

- 7. Minimum Qualifications of Proposers.** To qualify for a contract award, a proposer must have the following minimum qualifications:

The vendor must meet the following minimum qualifications to be considered:

1. The Vendor must have at least three (3) years of successful experience providing project management and facilitation for State Education Agencies (SEA) or Local Education Agencies (LEA) strategic planning and stakeholder engagement.
2. Provide an executive summary (no more than ten pages) of response to RFP, emphasizing any unique aspects or strengths of provider/vendor.
3. Describe no more than three (3) similar education projects vendor has conducted. References should be provided as well.
4. Provide a detailed narrative of the work plan/implementation schedule, and pricing that will be used for the project.

- 8. Letter of Intent.** A Letter of Intent (LOI) is not required by this RFP

- 9. Inquiry Procedures.** All questions regarding this RFP or the Agency's procurement process must be directed, in writing, electronically (e-mail), to the Official Contact before the deadline specified in the Procurement Schedule. The early submission of questions is encouraged. Questions will not be accepted or answered verbally – neither in person nor over the telephone. All questions received before the deadline(s) will be answered. However, the Agency will not answer questions when the source is unknown (i.e., nuisance or anonymous questions). Questions deemed unrelated to the RFP or the procurement process will not be answered. At its discretion, the Agency may or may not respond to questions received after the deadline. If this RFP requires a Letter of Intent, the Agency reserves the right to answer questions only from those who have submitted such a letter. The Agency may combine similar questions and give only one answer. All questions and answers will be compiled into a written amendment to this RFP. If any answer to any question constitutes a material change to the RFP, the question and answer will be placed at the beginning of the amendment and duly noted as such.

The agency will release the answers to questions on a rolling basis and will post them to the CSDE website and CTSource. The Agency will publish any and all amendments to this RFP on the State Contracting Portal and, if available, on the Agency's RFP Web Page.

- 10. RFP Conference.** An RFP conference will not be held to answer questions from prospective proposers

- 11. Proposal Due Date and Time.** The Official Contact is the **only authorized recipient** of proposals submitted in response to this RFP. Proposals must be received by the Official Contact on or before the due date and time: November 12, 2021 at 5:00pm EST via email to Irene.Parisi@ct.gov.

Proposals received after the due date and time will be ineligible and will not be evaluated. The Agency will send an official letter alerting late respondents of ineligibility.

An acceptable submission must include the following:

- One (1) conforming electronic copy of the original proposal.

The proposal must be complete, properly formatted and outlined, and ready for evaluation by the Screening Committee.

The electronic copy of the proposal must be emailed to official agency contact for this procurement. The subject line of the email must read: Remote Learning Commission Consultative Services. Required forms and appendices may be scanned and submitted as PDFs at the end of the main proposal document. Please ensure the entire email submission is less than 25MB as this reflects The Agency's server limitations. Respondents should work to ensure there are not additional IT limitations from the provider side.

12. Multiple Proposals. The submission of multiple proposals is not an option for this procurement.

II. PURPOSE OF RFP AND SCOPE OF SERVICES

■ A. AGENCY OVERVIEW

The State Board of Education and CSDE are committed to ensuring that equitable access and opportunities are at the forefront of our collaborative inquiry and collective responsibility. We are challenging and holding ourselves accountable to secure an excellent education for current and future generations of students. The CSDE provides guidance and leadership to districts so they can support great schools where great teachers and leaders hold high expectations for all Connecticut students.

The CSDE is committed to providing guidance and research to support the design and development of future ready learning models where all learners have access and opportunity to engage, learn and think critically. The CSDE recognizes that to create future-ready learning environments, teachers, students, and families require daily access to high-quality, high-impact teaching and learning.

■ B. SERVICE OVERVIEW

- Consultative services, research, and report preparation to support the CSDE and the Remote Learning Commission to analyze and provide recommendations concerning the provision of remote learning to public school students enrolled in grades kindergarten to twelve, inclusive.
 - Problem Statement: To determine the feasibility of creating a state-wide remote learning school that will serve students in grades kindergarten to twelve
 - Service Outcome Goals:
 - Outcome Goal 1: Co-facilitate Commission meetings to ensure engagement and that each voice is heard allowing for collaboration and diverse perspectives
 - Outcome Goal 2: Development of a report/plan for the Commission to present to the Commissioner of Education on the feasibility of a state-wide remote learning school
 - Outcome Goal 3: Development of a request for proposal to procure items required to support a state-wide remote learning school
 - Outcome Goal 4: Manage project of co-facilitation of the Remote Learning Commission to produce reports and plans to inform the CSDE
- Target User Population: Appointed members of the Remote Learning Commission and CSDE
- Service Authorization (Public Act / Statute): Senate Bill 1202, Public Act 21-2, Sec. 387 and 388
 - Other Key Insights from Strategic Planning, including takeaways from past experiences with similar services

- The provider/vendor works in collaboration with the CSDE
- Knowledge of Remote Learning and Virtual Learning
- Knowledge of educational structures and systems i.e. operations of a school day
- Vision for a Successful Service: By July 1, 2022 the Remote Learning Commission provider/vendor in collaboration with the CSDE and the Remote Learning Commission must submit a report on the findings and recommendations to the Commission for review
- Priorities for Improvement: The CSDE prioritizes the analysis and review of the impact of remote learning on the following focus areas:
 - the educational attainment of students in elementary, middle and high school,
 - students' physical and emotional development, access to special services including mental health, and access to food security and nutrition, and
 - the quality of instructional delivery.

■ **C. SCOPE OF SERVICE DESCRIPTION**

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified vendors to establish a year and a half contract for providing consultative services for the CSDE Remote Learning Commission.

The provider/vendor selected by the CSDE will be expected to:

- a) Co-facilitate with the CSDE Remote Learning Commission chairperson and Commissioner of Education monthly commission meetings
- b) Conduct feasibility study of creating a state-wide remote learning school that will serve students in grades kindergarten to twelve
- c) Consult and support the development of a feasibility plan/report for the creation and implementation of a state-wide remote learning school that offers grades kindergarten to twelve, inclusive, and provides remote learning to students. In the course of developing such plan, the provider/vendor will:
 - a. consider the findings and recommendations of the remote learning audit conducted by the CSDE
 - b. review remote learning schools and models being implemented in other states, and consult with the Remote Learning Commission on the feasibility of creating a state-wide remote learning school that may be maintained by and under the direction and control of the State Board of Education
- d) Consult and support the design of a request for proposals for any items required to create and implement a state-wide remote learning school
- e) Not later than May 1, 2023, the provider/vendor shall design, develop and submit the plan/report, the draft request for proposals and any recommendations for legislation related to the implementation of such plan to the Remote Learning Commission and Commissioner of Education
- f) Demonstrate proximity to CSDE and service requested

The scope of services must be provided over a year and half period through July 1, 2023.

1. Organizational Expectations

- Education and Digital Technology Consultant with knowledge of instructional learning models
- Local, Regional, or national organization or location of service

2. Service Expectations

- Provide facilitation and consultative services of the Remote Learning Commission
- Major Deliverables
 - Record and submit minutes of each Remote Learning Commission Meeting
 - Prepare and distribute Commission meeting materials
 - Establish Commission facilitation protocols and norms

- Facilitate a minimum of 20 Remote Learning Commission Meetings
- Collaborate with Commission chairperson and Commissioner of Education
- Submit report findings on the feasibility of a statewide Remote Learning School by May 1, 2023
- Provide Legal Requirements around Compliance with State/Federal Regulations
- Provide service hours of operation and availability from 8:00am – 6:00pm EST
- Ability to collaborate with stakeholders from diverse backgrounds including educators and legislators
- Ability to provide Culturally Competent Services for a diverse group
- Ability to collaborate with CSDE and Remote Learning Commission and coordinate resources to support the identified outcomes of the project

3. Staffing Expectations

- *Staffing:* Available and appropriate staff to provide project lead, facilitator, and researcher
- *Credentials / Licensure:* The Vendor must have at least three (3) years of successful experience providing project management and facilitation for State Education Agencies (SEA) or Local Education Agencies (LEA) strategic planning and stakeholder engagement.

4. Data and Technology Expectations

- Provide means and method for recording and submitting Commission minutes
- Consolidate findings and publish report for Remote Learning Commission and Commissioner of Education using appropriate software

5. Financial Expectations

- Financial Control Procedures
- Audited Financial Statements
- Liability Insurance Requirements

6. Budget Expectations

- Provide detailed budget and budget narrative describing the deliverables and associated costs for the scope of the project
- Funding Sources: Connecticut State Budget
- Total Available Funding: \$150,000
- Period of Award: November 2021 – July 1, 2023

The role of the CSDE in the Remote Learning Commission is to act as the chairperson to the Commission and liaison to the Commissioner of Education on progress toward the development of a feasibility report/plan on a state-wide remote learning school. The designated chairperson will collaborate with the provider/vendor to design the process and protocol to ensure productive Remote Learning Commission meetings and dialogue.

■ D. PERFORMANCE MEASURES

The following performance metrics highlight key priorities that will be analyzed with providers/vendors collaboratively during the life of the contract. This is not an exhaustive list, but rather an indication of significant performance metrics of interest to the Agency. The Agency looks forward to working with providers/vendors to define additional important performance metrics.

1. Facilitate a minimum of 20 Remote Learning Commission meetings upon execution of contract through July 1, 2023
2. Record and distribute Commission minutes upon execution of contract through July 1, 2023
3. Conduct and submit a report on the local and national environment

4. Complete and submit feasibility plan/report of creating a state-wide remote learning school that will serve students in grades kindergarten to twelve with a draft request for proposals for items required to implement state-wide remote learning not later than May 1, 2023

■ E. CONTRACT MANAGEMENT/DATA REPORTING

As part of the State’s commitment to becoming more outcomes oriented, CSDE seeks to actively and regularly collaborate with providers/vendors to enhance contract management, improve results, and adjust service delivery and policy based on learning what works. Reliable and relevant data is necessary to ensure compliance, inform trends to be monitored, evaluate results and performance, and drive service improvements. As such, CSDE reserves the right to request/collect other key data and metrics from providers/vendors.

The provider/vendor will be required to establish appropriate data collection and review, in collaboration with the CSDE, including

- Attend a minimum of 20 regular meetings with Remote Learning Commission chairperson or Commissioner of Education to share updates and insights aligned with deliverables and identified performance metrics upon execution of the contract through July 1, 2023
- Record and report monthly Remote Learning Commission minutes upon execution of the contract through July 1, 2023
- Analysis of research presented on remote learning in an understandable format
- Provide pertinent data and research to support planning for a statewide K-12 Remote Learning School on a quarterly basis

III. PROPOSAL SUBMISSION OVERVIEW

■ A. SUBMISSION FORMAT INFORMATION

1. Required Outline. All proposals must follow the required outline presented in Section IV – Proposal Outline. Proposals that fail to follow the required outline will be deemed non-responsive and not evaluated.

2. Cover Sheet. The Cover Sheet is Page 1 of the proposal. The proposer must develop a Cover Sheet that includes the information below. *Legal Name* is defined as the name of the provider, vendor, CT State agency, or municipality submitting the proposal. *Contact Person* is defined as the individual who can provide additional information about the proposal or who has immediate responsibility for the proposal. *Authorized Official* is defined as the individual empowered to submit a binding offer on behalf of the proposer to provide services in accordance with the terms and provisions described in this RFP and any amendments or attachments hereto.

- RFP Name or Number:
- Legal Name:
- FEIN:
- Street Address:
- Town/City/State/Zip:
- Contact Person:
- Title:
- Phone Number:
- E-Mail Address:

- Authorized Official:
- Title:
- Signature:

2. Table of Contents. All proposals must include a Table of Contents that conforms with the required proposal outline.

3. Executive Summary. Proposals must include a high-level summary, including an organization overview not exceeding 10 pages, of the main proposal and cost proposal. The summary must also include the organization's eligibility and qualifications to respond to this RFP. Describe no more than three (3) similar education projects vendor has conducted. References should be provided as well. Provide a detailed narrative of the implementation schedule, and pricing that will be used for the project.

4. Attachments. Attachments other than the required Appendices or Forms identified in the RFP are not permitted and will not be evaluated. Further, the required Appendices or Forms must not be altered or used to extend, enhance, or replace any component required by this RFP. Failure to abide by these instructions will result in disqualification.

5. Style Requirements. THIS IS AN ELECTRONIC SUBMISSION.

- Page Limit: No overall limit, however, see individual sections for page limits
- Font Size: 12pt
- Font Type: Times New Roman
- Margins: 1-inch margins
- Line Spacing: 1.5 spacing

7. Pagination. The proposer's name must be displayed in the header of each page. All pages, including the required Appendices and Forms, must be numbered in the footer.

8. Declaration of Confidential Information. Proposers are advised that all materials associated with this procurement are subject to the terms of the Freedom of Information Act (FOIA), the Privacy Act, and all rules, regulations and interpretations resulting from them. If a proposer deems that certain information required by this RFP is confidential, the proposer must label such information as CONFIDENTIAL prior to submission. In subsection F of the proposal submission, the proposer must reference where the information labeled CONFIDENTIAL is located in the proposal. *EXAMPLE: Section G.1.a.* For each subsection so referenced, the proposer must provide a convincing explanation and rationale sufficient to justify an exemption of the information from release under the FOIA. The explanation and rationale must be stated in terms of (a) the prospective harm to the competitive position of the proposer that would result if the identified information were to be released and (b) the reasons why the information is legally exempt from release pursuant to C.G.S. § 1-210(b).

9. Conflict of Interest - Disclosure Statement. Proposers must include a disclosure statement concerning any current business relationships (within the last three (3) years) that pose a conflict of interest, as defined by C.G.S. § 1-85. A conflict of interest exists when a relationship exists between the proposer and a public official (including an elected official) or State employee that may interfere with fair competition or may be adverse to the interests of the State. The existence of a conflict of interest is not, in and of itself, evidence of wrongdoing. A conflict of interest may, however, become a legal matter if a proposer tries to influence, or

succeeds in influencing, the outcome of an official decision for their personal or corporate benefit. The Agency will determine whether any disclosed conflict of interest poses a substantial advantage to the proposer over the competition, decreases the overall competitiveness of this procurement, or is not in the best interests of the State. In the absence of any conflict of interest, a proposer must affirm such in the disclosure statement. *Example: "[name of proposer] has no current business relationship (within the last three (3) years) that poses a conflict of interest, as defined by C.G.S. § 1-85."*

■ **B. EVALUATION OF PROPOSALS**

- 1. Evaluation Process.** It is the intent of the Agency to conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this RFP. When evaluating proposals, negotiating with successful proposers, and awarding contracts, the Agency will conform with its written procedures for POS and PSA procurements (pursuant to C.G.S. § 4-217) and the State’s Code of Ethics (pursuant to C.G.S. §§ 1-84 and 1-85). Final funding allocation decisions will be determined during contract negotiation.
- 2. Evaluation Review Committee.** The Agency will designate a Review Committee to evaluate proposals submitted in response to this RFP. The Review Committee will be composed of individuals, Agency staff or other designees as deemed appropriate. The contents of all submitted proposals, including any confidential information, will be shared with the Review Committee. Only proposals found to be responsive (that is, complying with all instructions and requirements described herein) will be reviewed, rated, and scored. Proposals that fail to comply with all instructions will be rejected without further consideration. The Review Committee shall evaluate all proposals that meet the Minimum Submission Requirements by score and rank ordered and make recommendations for awards. The Commissioner of Education will make the final selection. Attempts by any proposer (or representative of any proposer) to contact or influence any member of the Review Committee may result in disqualification of the proposer.
- 3. Minimum Submission Requirements.** To be eligible for evaluation, proposals must (1) be received on or before the due date and time; (2) meet the Proposal Format requirements; (3) meet the Eligibility and Qualification requirements to respond to the procurement, (4) follow the required Proposal Outline; and (5) be complete. Proposals that fail to follow instructions or satisfy these minimum submission requirements will not be reviewed further. The Agency will reject any proposal that deviates significantly from the requirements of this RFP.
- 4. Evaluation Criteria (and Weights).** Proposals meeting the Minimum Submission Requirements will be evaluated according to the established criteria. The criteria are the objective standards that the Review Committee will use to evaluate the technical merits of the proposals. Only the criteria listed below will be used to evaluate proposals. The weights are disclosed below.

Evaluation Criterion Title	Percentage of Total	What would a top score look like?
Executive Summary/ Organizational Profile	20%	<ul style="list-style-type: none"> • Provides overview of project and • Describes qualifications and expertise and strength in supporting the SEA

		<ul style="list-style-type: none"> • Lists project objectives, which relate to goals of the CSDE • Includes reasonable timeline
Scope of Services	20%	<ul style="list-style-type: none"> • Defined scope of services, deliverables, and timeline • Method of approach
Work Plan	20%	Detailed work plan with: <ul style="list-style-type: none"> • Timetable / Schedule • Aligned Tasks and Deliverables • Aligned methodologies • Measurable Objectives/Metrics
Organization Capacity/ Staffing Plan	10%	<ul style="list-style-type: none"> • Support personnel provided to support the project and deliverables • demonstrated commitment to affirmative action • Experience in the field
Data and Technology	10%	<ul style="list-style-type: none"> • Means and method for recording and submission of minutes • Consolidation of findings • Reporting systems
Financial profile	10%	<ul style="list-style-type: none"> • Experience in the market of consultancy for SEA or LEA and education markets
Budget and Resource Allocation/ Budget Narrative	10%	<ul style="list-style-type: none"> • Defined budget and narrative describing the deliverables and associated costs for the scope of the project • Planned approach to allocating resources to each component of the project

Note:

As part of its evaluation of the Staffing Plan, the Review Committee will review the proposer’s demonstrated commitment to affirmative action, as required by the Regulations of CT State Agencies § 46A-68j-30(10).

5. Proposer Selection. Upon completing its evaluation of proposals, the Review Committee will submit the rankings of all proposals to the Commissioner or Agency Head. The final selection of a successful proposer is at the discretion of the Commissioner or Agency Head. Any proposer selected will be so notified and awarded an opportunity to negotiate a contract with the Agency. Such negotiations may, but will not automatically, result in a contract. Any resulting contract will be posted on the State Contracting Portal. All unsuccessful proposers will be notified by e-mail or U.S. mail, at the Agency’s discretion, about the outcome of the evaluation and proposer selection process. The Agency reserves the right to decline to award contracts for activities in which the Commissioner or Agency Head considers there are not adequate respondents.

6. Debriefing. Within ten (10) days of receiving notification from the Agency, unsuccessful proposers may contact the Official Contact and request information about the evaluation and proposer selection process. The e-mail sent date will be considered “day one” of the ten (10) days. If unsuccessful proposers still have questions after receiving this information, they may contact the Official Contact and request a meeting with the Agency to discuss the evaluation process and their proposals. If held, the debriefing meeting will not include any comparisons of

unsuccessful proposals with other proposals. The Agency may schedule and hold the debriefing meeting within fifteen (15) days of the request. The Agency will not change, alter, or modify the outcome of the evaluation or selection process as a result of any debriefing meeting.

7. Appeal Process. Proposers may appeal any aspect the Agency’s competitive procurement, including the evaluation and proposer selection process. Any such appeal must be submitted to the Agency head. A proposer may file an appeal at any time after the proposal due date, but not later than thirty (30) days after an agency notifies unsuccessful proposers about the outcome of the evaluation and proposer selection process. The e-mail sent date will be considered “day one” of the fourteen (14) days. The filing of an appeal shall not be deemed sufficient reason for the Agency to delay, suspend, cancel, or terminate the procurement process or execution of a contract. More detailed information about filing an appeal may be obtained from the Official Contact.

8. Contract Execution. Any contract developed and executed as a result of this RFP is subject to the Agency’s contracting procedures, which may include approval by the Office of the Attorney General. Fully executed and approved contracts will be posted on State Contracting Portal and the Agency website.

IV. REQUIRED PROPOSAL SUBMISSION OUTLINE AND REQUIREMENTS

- A. Cover Sheet**
- B. Table of Contents**
- C. Executive Summary**
- D. Main Proposal**
- E. Attachments** (clearly referenced to summary and main proposal where applicable)
- F. Declaration of Confidential Information**
- G. Conflict of Interest - Disclosure Statement**
- H. Statement of Assurances**

A: Cover Sheet

The Respondent must use a Cover Sheet capturing the following information:

- RFP Name or Number: SDE – Consultative Services on Remote Learning #832
- Legal Name:
- FEIN (not required for currently contracted providers/vendors):
- Street Address:
- Town/City/State/Zip:

- Contact Person:
- Title:
- Phone Number:
- E-Mail Address:
- Authorized Official:
- Title:
- Signature:

Legal Name is defined as the name of provider, vendor, CT State agency, or municipality submitting the proposal. *Contact Person* is defined as the individual who can provide additional information about the proposal or who has immediate responsibility for the proposal. *Authorized Official* is defined as the individual empowered to submit a binding offer on behalf of the proposer to provide services in accordance with the terms and provisions described in this RFP and any amendments or attachments hereto.

B: Table of Contents

Respondents must include a Table of Contents that lists sections and subsections with page numbers that follow the organization outline and sequence for this proposal.

C: Proposer Executive Summary

The page limitation for this section is 10 pages briefly describing how the Respondent meets the eligibility and qualification criteria outlined in the Proposal Overview and a brief overview of why the Respondent should be selected for the activities highlighted in the scope of services.

D: Main Proposal Submission Requirements To Submit a Responsive Proposal:

*****Please note the maximum total page length for this section is 10** (all appendices and other attachments should be referred to in section D and then placed in section E. The Agency Review Committee will not read answers longer than 10 pages in this section.

4.1 Strengths and Qualifications of Agency & Staff

- a. *Purpose, Mission, Vision, Values.*
- b. *Entity Type / Parent Organization / Years of Operation*
- c. *Location of Offices / Facilities*
- d. *Functional Organization*
- e. *Current Range of Services / Clients*
- f. *Qualifications*
- g. *Relevant Experience*
- h. *Accreditation / Certification / Licensure.*
- i. *References*

4.2 Scope of Services

- a. *Catchment Area*
- b. *Documentation of Needs / Resources*
- c. *Collaboration Approach/ Methodology*
- d. *Service Capacity / Delivery Plan / Systems / Processes / Protocols*
- e. *Quality Assurance Protocols*
- f. *Administrative Support*

- g. *Special Health or Safety Requirements*

4.3 Staffing Plan

- a. *Key Personnel / Managers*
- b. *Staffing Levels & Qualifications*
- c. *Job Descriptions*
- d. *Personnel Organization Chart*
- e. *Staff Training / Education / Development*

4.4 Data and Technology

- a. *Data Collection / Storage / Reporting*

4.5 Subcontractors

- a. *Legal Name of Entity, Address, FEIN*
- b. *Contact Person, Title, Phone, Fax, E-mail*
- c. *Services Currently Provided*
- d. *Services To Be Provided Under Subcontract*
- e. *Subcontractor Oversight*
- f. *Subcontract Cost and Term*

4.6 Work Plan

- a. *Start Date*
- b. *Timetable / Schedule*
- c. *Tasks, Deliverables*
- d. *Methodologies*
- e. *Measurable Objectives/Metrics*

4.7 Financial Profile

- a. *Annual Budget and Revenues*
- b. *Financial Standing*
- c. *Financial Management Systems*
- d. *Revenue Generation / Billing / Third Party Reimbursement*
- e. *History of Violations (financial or programming)*

4.8 Cost Competitiveness and Budget Narrative

- a. *Narrative*
- b. *Line Item Budget Form*

E: Attachments

Attachments other than the required attachments identified are not permitted and will not be evaluated. See the Proposal Checklist in Appendix C for a list of relevant attachments. Further, the required attachments must not be altered or used to extend, enhance, or replace any component required by this RFP. Failure to abide by these instructions may result in disqualification.

- a. *Memorandum of Agreement*

- b. Résumés of Key Personnel
- c. Audited Financial Statements
- d. Insurance documents

F: Declaration of Confidential Information

If a proposer deems that certain information required by this RFP is confidential, the proposer must label such information as CONFIDENTIAL prior to submission. The proposer must reference where the information labeled CONFIDENTIAL is located in the proposal. *EXAMPLE: Section G.1.a.* For each subsection so referenced, the proposer must provide a convincing explanation and rationale sufficient to justify an exemption of the information from release under the FOIA. The explanation and rationale must be stated in terms of (a) the prospective harm to the competitive position of the proposer that would result if the identified information were to be released and (b) the reasons why the information is legally exempt from release pursuant to C.G.S. § 1-210(b).

G: Conflict of Interest – Disclosure Statement

Proposers must include a disclosure statement concerning any current business relationships (within the last three (3) years) that pose a conflict of interest, as defined by C.G.S. § 1-85. A conflict of interest exists when a relationship exists between the proposer and a public official (including an elected official) or State employee that may interfere with fair competition or may be adverse to the interests of the State. The existence of a conflict of interest is not, in and of itself, evidence of wrongdoing. A conflict of interest may, however, become a legal matter if a proposer tries to influence, or succeeds in influencing, the outcome of an official decision for their personal or corporate benefit. In the absence of any conflict of interest, a proposer must affirm such in the disclosure statement. *Example: "[name of proposer] has no current business relationship (within the last three (3) years) that poses a conflict of interest, as defined by C.G.S. § 1-85."*

H: Statement of Assurances

Proposers must include the Statement of Assurances provided in Section VI-B. Sign and return and place after Conflict of Interest-Disclosure Statement.

V. MANDATORY PROVISIONS

■ **A. STANDARD CONTRACT PROVISIONS**

Proposers can review the [Comptroller’s Office PSA Terms and Conditions](#) for standard contract requirements

■ B. ASSURANCES

By submitting a proposal in response to this RFP, a proposer implicitly gives the following assurances:

- 1. Collusion.** The proposer represents and warrants that the proposer did not participate in any part of the RFP development process and had no knowledge of the specific contents of the RFP prior to its issuance. The proposer further represents and warrants that no agent, representative, or employee of the State participated directly in the preparation of the proposer's proposal. The proposer also represents and warrants that the submitted proposal is in all respects fair and is made without collusion or fraud.
- 2. State Officials and Employees.** The proposer certifies that no elected or appointed official or employee of the State has or will benefit financially or materially from any contract resulting from this RFP. The Agency may terminate a resulting contract if it is determined that gratuities of any kind were either offered or received by any of the aforementioned officials or employees from the proposer, contractor, or its agents or employees.
- 3. Competitors.** The proposer assures that the submitted proposal is not made in connection with any competing organization or competitor submitting a separate proposal in response to this RFP. No attempt has been made, or will be made, by the proposer to induce any other organization or competitor to submit, or not submit, a proposal for the purpose of restricting competition. The proposer further assures that the proposed costs have been arrived at independently, without consultation, communication, or agreement with any other organization or competitor for the purpose of restricting competition. Nor has the proposer knowingly disclosed the proposed costs on a prior basis, either directly or indirectly, to any other organization or competitor.
- 4. Validity of Proposal.** The proposer certifies that the proposal represents a valid and binding offer to provide services in accordance with the terms and provisions described in this RFP and any amendments or attachments hereto. The proposal shall remain valid for a period of 180 days after the submission due date and may be extended beyond that time by mutual agreement. At its sole discretion, the Agency may include the proposal, by reference or otherwise, into any contract with the successful proposer.
- 5. Press Releases.** The proposer agrees to obtain prior written consent and approval of the Agency for press releases that relate in any manner to this RFP or any resultant contract.

■ C. TERMS AND CONDITIONS

By submitting a proposal in response to this RFP, a proposer implicitly agrees to comply with the following terms and conditions:

- 1. Equal Opportunity and Affirmative Action.** The State is an Equal Opportunity and Affirmative Action employer and does not discriminate in its hiring, employment, or business practices. The State is committed to complying with the Americans with Disabilities Act of 1990 (ADA) and does not discriminate on the basis of disability in admission to, access to, or operation of its programs, services, or activities.

- 2. Preparation Expenses.** Neither the State nor the Agency shall assume any liability for expenses incurred by a proposer in preparing, submitting, or clarifying any proposal submitted in response to this RFP.
- 3. Exclusion of Taxes.** The Agency is exempt from the payment of excise and sales taxes imposed by the federal government and the State. Proposers are liable for any other applicable taxes.
- 4. Proposed Costs.** No cost submissions that are contingent upon a State action will be accepted. All proposed costs must be fixed through the entire term of the contract.
- 5. Changes to Proposal.** No additions or changes to the original proposal will be allowed after submission. While changes are not permitted, the Agency may request and authorize proposers to submit written clarification of their proposals, in a manner or format prescribed by the Agency, and at the proposer's expense.
- 6. Supplemental Information.** Supplemental information will not be considered after the deadline submission of proposals, unless specifically requested by the Agency. The Agency may ask a proposer to give demonstrations, interviews, oral presentations or further explanations to clarify information contained in a proposal. Any such demonstration, interview, or oral presentation will be at a time selected and in a place provided by the Agency. At its sole discretion, the Agency may limit the number of proposers invited to make such a demonstration, interview, or oral presentation and may limit the number of attendees per proposer.
- 7. Presentation of Supporting Evidence.** If requested by the Agency, a proposer must be prepared to present evidence of experience, ability, data reporting capabilities, financial standing, or other information necessary to satisfactorily meet the requirements set forth or implied in this RFP. The Agency may make onsite visits to an operational facility or facilities of a proposer to evaluate further the proposer's capability to perform the duties required by this RFP. At its discretion, the Agency may also check or contact any reference provided by the proposer.
- 8. RFP Is Not An Offer.** Neither this RFP nor any subsequent discussions shall give rise to any commitment on the part of the State or the Agency or confer any rights on any proposer unless and until a contract is fully executed by the necessary parties. The contract document will represent the entire agreement between the proposer and the Agency and will supersede all prior negotiations, representations or agreements, alleged or made, between the parties. The State shall assume no liability for costs incurred by the proposer or for payment of services under the terms of the contract until the successful proposer is notified that the contract has been accepted and approved by the Agency and, if required, by the Attorney General's Office.

■ D. RIGHTS RESERVED TO THE STATE

By submitting a proposal in response to this RFP, a proposer implicitly accepts that the following rights are reserved to the State:

- 1. Timing Sequence.** The timing and sequence of events associated with this RFP shall ultimately be determined by the Agency.
- 2. Amending or Canceling RFP.** The Agency reserves the right to amend or cancel this RFP on any date and at any time, if the Agency deems it to be necessary, appropriate, or otherwise in the best interests of the State.

- 3. No Acceptable Proposals.** In the event that no acceptable proposals are submitted in response to this RFP, the Agency may reopen the procurement process, if it is determined to be in the best interests of the State.
- 4. Award and Rejection of Proposals.** The Agency reserves the right to award in part, to reject any and all proposals in whole or in part, for misrepresentation or if the proposal limits or modifies any of the terms, conditions, or specifications of this RFP. The Agency may waive minor technical defects, irregularities, or omissions, if in its judgment the best interests of the State will be served. The Agency reserves the right to reject the proposal of any proposer who submits a proposal after the submission date and time.
- 5. Sole Property of the State.** All proposals submitted in response to this RFP are to be the sole property of the State. Any product, whether acceptable or unacceptable, developed under a contract awarded as a result of this RFP shall be the sole property of the State, unless stated otherwise in this RFP or subsequent contract. The right to publish, distribute, or disseminate any and all information or reports, or part thereof, shall accrue to the State without recourse.
- 6. Contract Negotiation.** The Agency reserves the right to negotiate or contract for all or any portion of the services contained in this RFP. The Agency further reserves the right to contract with one or more proposer for such services. After reviewing the scored criteria, the Agency may seek Best and Final Offers (BFO) on cost from proposers. The Agency may set parameters on any BFOs received.
- 7. Clerical Errors in Award.** The Agency reserves the right to correct inaccurate awards resulting from its clerical errors. This may include, in extreme circumstances, revoking the awarding of a contract already made to a proposer and subsequently awarding the contract to another proposer. Such action on the part of the State shall not constitute a breach of contract on the part of the State since the contract with the initial proposer is deemed to be void *ab initio* and of no effect as if no contract ever existed between the State and the proposer.
- 8. Key Personnel.** When the Agency is the sole funder of a purchased service, the Agency reserves the right to approve any additions, deletions, or changes in key personnel, with the exception of key personnel who have terminated employment. The Agency also reserves the right to approve replacements for key personnel who have terminated employment. The Agency further reserves the right to require the removal and replacement of any of the proposer's key personnel who do not perform adequately, regardless of whether they were previously approved by the Agency.

■ E. STATUTORY AND REGULATORY COMPLIANCE

By submitting a proposal in response to this RFP, the proposer implicitly agrees to comply with all applicable State and federal laws and regulations, including, but not limited to, the following:

- 1. Freedom of Information, C.G.S. § 1-210(b).** The Freedom of Information Act (FOIA) generally requires the disclosure of documents in the possession of the State upon request of any citizen, unless the content of the document falls within certain categories of exemption, as defined by C.G.S. § 1-210(b). Proposers are generally advised not to include in their proposals any confidential information. If the proposer indicates that certain documentation, as required by this RFP, is submitted in confidence, the State will endeavor to keep said information confidential to the

extent permitted by law. The State has no obligation to initiate, prosecute, or defend any legal proceeding or to seek a protective order or other similar relief to prevent disclosure of any information pursuant to a FOIA request. The proposer has the burden of establishing the availability of any FOIA exemption in any proceeding where it is an issue. While a proposer may claim an exemption to the State's FOIA, the final administrative authority to release or exempt any or all material so identified rests with the State. In no event shall the State or any of its employees have any liability for disclosure of documents or information in the possession of the State and which the State or its employees believe(s) to be required pursuant to the FOIA or other requirements of law.

- 2. Contract Compliance, C.G.S. § 4a-60 and Regulations of CT State Agencies § 46a-68j-21 thru 43, inclusive.** CT statute and regulations impose certain obligations on State agencies (as well as contractors and subcontractors doing business with the State) to ensure that State agencies do not enter into contracts with organizations or businesses that discriminate against protected class persons.
- 3. Consulting Agreements Representation, C.G.S. § 4a-81.** Pursuant to C.G.S. §§ 4a-81 the successful contracting party shall certify that it has not entered into any consulting agreements in connection with this Contract, except for the agreements listed below. "Consulting agreement" means any written or oral agreement to retain the services, for a fee, of a consultant for the purposes of (A) providing counsel to a contractor, vendor, consultant or other entity seeking to conduct, or conducting, business with the State, (B) contacting, whether in writing or orally, any executive, judicial, or administrative office of the State, including any department, institution, bureau, board, commission, authority, official or employee for the purpose of solicitation, dispute resolution, introduction, requests for information, or (C) any other similar activity related to such contracts. "Consulting agreement" does not include any agreements entered into with a consultant who is registered under the provisions of chapter 10 of the Connecticut General Statutes as of the date such contract is executed in accordance with the provisions of section 4a-81 of the Connecticut General Statutes. Such representation shall be sworn as true to the best knowledge and belief of the person signing the resulting contract and shall be subject to the penalties of false statement.
- 4. Campaign Contribution Restriction, C.G.S. § 9-612.** For all State contracts, defined in section 9-612 of the Connecticut General Statutes as having a value in a calendar year of \$50,000 or more, or a combination or series of such agreements or contracts having a value of \$100,000 or more, the authorized signatory to the resulting contract must represent that they have received the State Elections Enforcement Commission's notice advising state contractors of state campaign contribution and solicitation prohibitions, and will inform its principals of the contents of the notice, as set forth in "Notice to Executive Branch State Contractors and Prospective State Contractors of Campaign Contribution and Solicitation Limitations." Such notice is available at https://seec.ct.gov/Portal/data/forms/ContrForms/seec_form_11_notice_only.pdf
- 5. Gifts, C.G.S. § 4-252.** Pursuant to section 4-252 of the Connecticut General Statutes and Acting Governor Susan Bysiewicz's Executive Order No. 21-2, the Contractor, for itself and on behalf of all of its principals or key personnel who submitted a bid or proposal, represents:
 - (1) That no gifts were made by (A) the Contractor, (B) any principals and key personnel of the Contractor, who participate substantially in preparing bids, proposals or negotiating State contracts, or (C) any agent of the Contractor or principals and key personnel, who participates substantially in preparing bids,

proposals or negotiating State contracts, to (i) any public official or State employee of the State agency or quasi- public agency soliciting bids or proposals for State contracts, who participates substantially in the preparation of bid solicitations or requests for proposals for State contracts or the negotiation or award of State contracts, or (ii) any public official or State employee of any other State agency, who has supervisory or appointing authority over such State agency or quasi-public agency;

(2) That no such principals and key personnel of the Contractor, or agent of the Contractor or of such principals and key personnel, knows of any action by the Contractor to circumvent such prohibition on gifts by providing for any other principals and key personnel, official, employee or agent of the Contractor to provide a gift to any such public official or State employee; and

(3) That the Contractor is submitting bids or proposals without fraud or collusion with any person.

Any bidder or proposer that does not agree to the representations required under this section shall be rejected and the State agency or quasi-public agency shall award the contract to the next highest ranked proposer or the next lowest responsible qualified bidder or seek new bids or proposals.

6. Iran Energy Investment Certification C.G.S. § 4-252(a). Pursuant to C.G.S. § 4-252(a), the successful contracting party shall certify the following: (a) that it has not made a direct investment of twenty million dollars or more in the energy sector of Iran on or after October 1, 2013, as described in Section 202 of the Comprehensive Iran Sanctions, Accountability and Divestment Act of 2010, and has not increased or renewed such investment on or after said date. (b) If the Contractor makes a good faith effort to determine whether it has made an investment described in subsection (a) of this section it shall not be subject to the penalties of false statement pursuant to section 4-252a of the Connecticut General Statutes. A "good faith effort" for purposes of this subsection includes a determination that the Contractor is not on the list of persons who engage in certain investment activities in Iran created by the Department of General Services of the State of California pursuant to Division 2, Chapter 2.7 of the California Public Contract Code. Nothing in this subsection shall be construed to impair the ability of the State agency or quasi-public agency to pursue a breach of contract action for any violation of the provisions of the resulting contract.

7. Nondiscrimination Certification, C.G.S. § 4a-60 and 4a-60a. If a bidder is awarded an opportunity to negotiate a contract, the proposer must provide the State agency with *written representation* in the resulting contract that certifies the bidder complies with the State's nondiscrimination agreements and warranties. This nondiscrimination certification is required for all State contracts – regardless of type, term, cost, or value. Municipalities and CT State agencies are exempt from this requirement. The authorized signatory of the contract shall demonstrate his or her understanding of this obligation by either (A) initialing the nondiscrimination affirmation provision in the body of the resulting contract, or (B) providing an affirmative response in the required online bid or response to a proposal question, if applicable, which asks if the contractor understands its obligations. If a bidder or vendor refuses to agree to this representation, such bidder or vendor shall be rejected and the State agency or quasi-public agency shall award the contract to the next highest ranked vendor or the next lowest responsible qualified bidder or seek new bids or proposals.

8. Access to Data for State Auditors. The Contractor shall provide to OPM access to any data, as defined in C.G.S. § 4e-1, concerning the resulting contract that are in the possession or control of the Contractor upon demand and shall provide the data to OPM in a format prescribed by OPM [or the Client Agency] and the State Auditors of Public Accounts at no additional cost.

VI. APPENDIX

A. ABBREVIATIONS / ACRONYMS / DEFINITIONS

BFO	Best and Final Offer
CSDE	Connecticut State Department of Education
C.G.S.	Connecticut General Statutes
CHRO	Commission on Human Rights and Opportunity (CT)
CT	Connecticut
DAS	Department of Administrative Services (CT)
FOIA	Freedom of Information Act (CT)
IRS	Internal Revenue Service (US)
LOI	Letter of Intent

OAG	Office of the Attorney General
OPM	Office of Policy and Management (CT)
OSC	Office of the State Comptroller (CT)
PSA	Personal Service Agreement
P.A.	Public Act (CT)
RFP	Request for Proposal
SEEC	State Elections Enforcement Commission (CT)
U.S.	United States

- *contractor*: a private provider organization, CT State agency, or municipality that enters into a POS contract with the Agency as a result of this RFP.
- *proposer*: a private provider organization, CT State agency, or municipality that has submitted a proposal to the Agency in response to this RFP. This term may be used interchangeably with respondent throughout the RFP.
- *prospective proposer*: a private provider organization, CT State agency, or municipality that may submit a proposal to the Agency in response to this RFP, but has not yet done so
- *subcontractor*: an individual (other than an employee of the contractor) or business entity hired by a contractor to provide a specific service as part of a PSA with the Agency as a result of this RFP

B. STATEMENT OF ASSURANCES

Connecticut State Department of Education

The undersigned Respondent affirms and declares that:

1) General

- a. This proposal is executed and signed with full knowledge and acceptance of the RFP CONDITIONS stated in the RFP.
- b. The Respondent will deliver services to the Agency the cost proposed in the RFP and within the timeframes therein.

- c. The Respondent will seek prior approval from the Agency before making any changes to the location of services.
- d. Neither the Respondent or any official of the organization nor any subcontractor of the Respondent or any official of the subcontractor organization has received any notices of debarment or suspension from contracting with the State of CT or the Federal Government.
- e. Neither the Respondent or any official of the organization nor any subcontractor to the Respondent or any official of the subcontractor's organization has received any notices of debarment or suspension from contracting with other states within the United States.

Legal Name of Organization:

Authorized Signatory

Date

C. PROPOSAL CHECKLIST

To assist respondents in managing proposal planning and document collation processes, this document summarizes key dates and proposal requirements for this RFP. Please note that this document does not supersede what is stated in the RFP. Please refer to the Proposal Submission Overview, Required Proposal Submission Outline, and Mandatory Provisions (Sections II, III, and IV of this RFP) for more comprehensive detail **This is a tool for proposers to use.** It is the responsibility of each respondent to ensure that all required documents, forms, and attachments, are submitted in a timely manner.

Key Dates

<u>Procurement Timetable</u>		
The Agency reserves the right to modify these dates at its sole discretion.		
Item	Action	Date

1	Submit RFP Questions	November 5, 2021
2	Submit Proposal	November 12, 2021
3	Announce award	By November 30, 2021

Registration with State Contracting Portal (if not already registered):

- Register at: <https://portal.ct.gov/DAS/CTSource/Registration>
- Submit required forms:
 - o Campaign Contribution Certification (OPM Ethics Form 1): <https://portal.ct.gov/OPM/Fin-PSA/Forms/Ethics-Forms>

Proposal Content Checklist

- Cover Sheet** including required information:
 - o RFP Name or Number
 - o Legal Name
 - o FEIN
 - o Street Address
 - o Town/City/State/Zip
 - o Contact Person
 - o Title
 - o Phone Number
 - o E-Mail Address
 - o Authorized Official
 - o Title
 - o Signature
- Table of Contents**
- Executive Summary:** high-level summary of proposal and cost
- Main proposal body answering all questions with relevant attachments.**
Proposers should use their discretion to determine whether certain required information is sufficiently captured in the body of their proposal or requires additional attachments for clarification. Additional attachments may include:
 - o Staffing plan with FTE status
 - o Staff resumes and applicable licensures
 - o Scope of Services Work plan describing organization’s efforts, progress, or plans to diversify workforce
 - o Detailed plan on cultural competence and humility in service delivery
 - o Memoranda of Agreement/Understanding with service partners
 - o Written financial policies and procedures
- IRS Determination Letter** (for nonprofit proposers)
- Two years of most recent annual audited financial statements; OR any financial statements prepared by a Certified Public Accountant** for proposers whose organizations have been incorporated for less than two years.
- Budget and Resource Allocation** including budget narrative and cost schedules for planned subcontractors if applicable.
- Conflict of Interest Disclosure Statement**
- Statement of Assurances**

Formatting Checklist

- Is the proposal formatted to fit 8 ½ x 11 (letter-sized) paper?
- Is the main body of the proposal within the page limit?
- Is the proposal in 12-point, Times New Roman font?
- Does the proposal format follow normal (1 inch) margins and 1 ½ line spacing?
- Does the proposer’s name appear in the header of each page?
- Does the proposal include page numbers in the footer?
- Are confidential labels applied to sensitive information (if applicable)?

Attachments

- Evidence of work stated in summary and main proposal