

# REQUEST FOR PROPOSALS (RFP)

**Solicitation Number: SRC0000001881**

The Ohio Department of Developmental Disabilities (DODD), Policy and Strategic Direction Division, is requesting proposals for:

## **Blueprint System Finance and Rate Expert**

For the Period: **State Fiscal Year 2022 – 2023 - January 1, 2022 through June 30, 2023**

DODD will be hosting an informational webinar about this RFP on November 19, 2021, at 12 PM. Please register at the link below:

<https://attendee.gotowebinar.com/register/7085230257340995342>

RFP Issued: November 1, 2021

Inquiry Period Begins: November 1, 2021

Inquiry Period Ends: December 1, 2021 at 12:00 pm

Proposals Due: December 22, 2021 at 12:00 pm

Submit Proposals via e-mail to:

Ohio Department of Developmental Disabilities  
DMRProcurement@dodd.ohio.gov

This RFP consists of five (5) parts and two (2) attachments, totaling nineteen (19) consecutively numbered pages. Please verify that you have a complete copy.

Please submit all inquiries about this RFP through the State Ohio|Buys website <https://supplier-emarketplace.ohio.gov/>. Please refer to Part Three of this RFP, “General Instructions”, for instructions on submitting inquiries through the State Ohio|Buys website. All responses to inquiries submitted by Proposers will be posted on the State Ohio|Buys website for viewing by all prospective Proposers.



Department of  
Developmental Disabilities

## **PART ONE: STRUCTURE OF THIS RFP**

### **PARTS**

Part One	Structure of this RFP
Part Two	Information on requested services
Part Three	General Instructions
Part Four	Evaluation of Proposals
Part Five	Contract Award

### **ATTACHMENTS**

Appendix 1 – Standard Affirmation and Disclosure Form

- Standard Affirmation and Disclosure Form must be signed by an authorized official of Proposer's organization and must be included for any proposal to be scored

Appendix 2 – Contractor Information Form

- Contractor Information Form must be completed and submitted with the proposal.

## **PART TWO: SERVICES REQUESTED INFORMATION**

### **I. MISSION & GUIDING PRINCIPLES**

The Ohio Department of Developmental Disabilities (DODD) is responsible for overseeing a statewide system of services and supports for people with developmental disabilities and their families. The mission of DODD is continuous improvement of the quality of life for Ohio's citizens with developmental disabilities and their families.

DODD will:

- Create less complex service, deliver, with fair and logical payment systems that are federally compliant
- Continue to be good stewards of limited resources
- Provide quality outcomes through a combination of people and processes
- Design service delivery models in response to choices made by the people served, in alliance with community supports
- Develop a system-wide vision and long-range strategic plan by listening to our funding partners, constituents and stakeholders

### **II. PURPOSE**

The Ohio Department of Developmental Disabilities (DODD) is seeking proposals from qualified contractors to work with DODD and a group of stakeholders to make necessary changes to service design and rate structure across adult day array non-work and work services, transportation, and quality assurance.

### **III. BACKGROUND**

Ohio's developmental disability (DD) system is designed to provide eligible individuals with increased opportunities to live, work, and thrive in their homes and communities through state-of-the-art planning, innovative technology, and supports that focuses on their talents, interests, and skills.

Adult Day and Employment Services have evolved rapidly in Ohio in the past few years. Provider organizations are changing programs and practices as they respond to a national pandemic, multiple and complex demands from federal and state authorities, advocacy organizations, and people with disabilities and their families.

To build on this ongoing evolution and progress, DODD convened a representative group of planners to help design strategy steps going forward. The Blueprint for Adult Day and Employment Services Work Group met from January 2020 to May 2021 as an advisory task force to DODD Director, Jeff Davis. This workgroup generated a proposal outlining the steps DODD must take to improve adult day non-work, work, transportation, and employment services. The full proposal from the Blueprint for Adult Day and Employment Services can be found [here](#). With the assistance of a contractor, a balance must be found between fiscal sustainability and the recommendations of the blueprint group. Ohio's current DD revenue base has remained relatively stable, but DODD estimates an increase in people identified as needing adult day array services.

#### **IV. SCOPE OF WORK AND DELIVERABLES**

The selected contractor will receive compensation for completion of the following deliverables as directed by DODD:

##### **State Fiscal Year 2022:**

**Deliverable 1:** Participate in a minimum of 9 planning calls with DODD representatives.

**Deliverable 2:** Convene a minimum of 4 implementation team meetings, with assistance from DODD representatives, to develop consensus on identified deliverables.

**Deliverable 3:** Work with the implementation team and other state agency personnel to outline changes to state appropriations, local financing, acuity assessment instrument, budget limitations, service definitions, and new rate calculations by:

- Evaluating Home and Community Based Waiver non-work, work, and employment service design based on blueprint for adult day and employment services work group recommendations.
  - Day habilitation service
    - Adult day support
  - Prevocational Service
    - Basic employment skills training
  - Supported Employment Services
    - Group employment support
    - Career planning
    - Benefits education and analysis
    - Individual employment supports.
- Conducting financial analysis, modeling, designing, developing including program financing, funding strategies, reimbursement, and rate setting.
- Incorporating service design and actuarial activities in support of new innovative or value-based financial initiatives.
- Providing technical support and assistance with all necessary actuarial tasks including rate setting.
- Work related to Prevocational Services and adult day support should be completed in SFY22.

##### **State Fiscal Year 2023:**

**Deliverable 1:** Participate in a minimum of 18 planning calls with DODD representatives.

**Deliverable 2:** Facilitate a minimum of 8 implementation team meetings through a coordinated process to develop consensus on identified deliverables.

**Deliverable 3:** Continue to work with the implementation team and other state agency personnel to outline changes to state appropriations, local financing, acuity assessment instrument, budget limitations, service definitions, and new rate calculations. The following tasks must be completed:

- Evaluate Home and Community Based Waiver non-work, work, and employment service design based on blueprint for adult day and employment services work group recommendations.

- Day habilitation service
  - Adult day support
- Prevocational Service
  - Basic employment skills training
- Supported Employment Services
  - Group employment support
  - Career planning
  - Benefits education and analysis
  - Individual employment supports.
- Conducting financial analysis, modeling, designing, developing including program financing, funding strategies, reimbursement, and rate setting.
- Evaluate and recommend revisions to current state appropriations and local financing of services.
- Evaluate and recommend revisions to current acuity assessment instrument
- Incorporate service design and actuarial activities in support of new innovative or value-based financial initiatives.
- Provide technical support and assistance with all necessary actuarial tasks including rate setting.

**Deliverable 4:** Develop a standard measurement tool/rubric around quality work, non-work, and transportation services.

## **V. MINIMUM QUALIFICATIONS OF CONTRACTOR**

Contractor must demonstrate the following experience:

- 10 or more years of field experience in residential and non-residential home and community-based waiver services and transportation services.
- 4 or more years of experience in rate-setting for home and community-based waiver services
- Expertise in best practices for adult day and employment services that lead to meaningful community membership and competitive, integrated employment outcomes.
- Knowledge of the ID/DD service system especially in Medicaid, Medicare, managed care, and long-term services and supports policy, practice, financing
- At least two years of experience in Ohio preferred.
- All contractors must demonstrate understanding of Ohio's Blueprint for Adult Day and Employment Services Proposal and provide examples of similar work in other states.
- The contractor shall not be subject to an "unresolved" finding for recovery under Section 9.24 of the Ohio Revised Code.

In addition to the above experience in the DD system, a contractor must have at least one member on the team who is certified by the American Academy of Actuaries, and the Society of Actuaries, and have at least ten (10) years of actuarial experience. Applicant must include copies of the required certification of these standards for each staff person in their proposal.

Contractor shall not be subject to an "unresolved" finding for recovery under Section 9.24 of Ohio Revised Code.

## **VI. ETHICAL AND CONFLICT OF INTEREST REQUIREMENTS**

No contractor or individual, company or organization seeking a contract shall promise or give to any DODD employee any item of value that is of such character as to manifest a substantial and improper influence upon the employee with respect to his or her duties.

No contractor or individual, company or organization seeking a contract shall solicit any DODD employee to violate any of the conduct requirements for employees.

Any contractor acting on behalf of DODD shall refrain from activities that could result in violations of ethics and/or conflicts of interest. Any contractor or potential contractor who violates the requirement and prohibitions defined Section 102.03 or Section 102.04 of the Ohio Revised Code is subject to termination of the contract or refusal by DODD to enter into a contract.

## **PART THREE: GENERAL INSTRUCTIONS**

The following sections provide a calendar of events, details on how to respond to this RFP and how to get more information about this RFP. All responses must be complete and in the prescribed format.

### **I. CALENDAR OF EVENTS & ON-LINE INFORMATION**

The schedule for this RFP is given below and is subject to change. DODD may change this schedule at any time. If DODD changes the schedule before the Proposal Due Date, it will do so through an announcement on the Ohio|Buys web site area for this RFP. The web site announcement will be followed by an addendum to this RFP, which also will be made available through the same Ohio|Buys web site.

It is each prospective Proposer's responsibility to check the Ohio|Buys web site's Inquires area for this RFP for current information and the calendar of events scheduled through award of any contract.

Other than by adherence to the RFP Inquiry process, set forth below, no contact related to this RFP shall be made with DODD until a contract award is announced. Notwithstanding this prohibition, DODD, at its sole discretion, may request additional information as part of the review process outlined below.

#### **Firm Dates**

RFP Issued:	November 1, 2021
Inquiry Period Begins:	November 1, 2021
Inquiry Period Ends:	December 1, 2021 at 12:00 pm
Proposal Due Date:	December 22, 2021 at 12:00 pm

#### **Estimated Dates**

Contract Award Notification:	January 7, 2021
Issuance of Purchase Order:	To be determined

### **II. PROPOSAL FORMAT**

Proposals must be prepared in accordance with instructions in this section. The proposal must clearly outline how each of the deliverables of Part 2 Section IV will be completed and with the time frames specified in that same section. **The technical proposal should not exceed ten (10) pages.**

To be accepted, a proposal must include a technical proposal and a cost proposal as described in this section, contain all the information specified for each of the categories listed in this section, and meeting the requirements of this section

#### **A. Technical Proposal**

##### **a. Transmittal letter includes:**

- Identifies the bidder
- The name, title, address, and telephone number of the proposer's contract person with authority to answer questions concerning the RFP
- The name, title, address, telephone number, and email address of the

proposer's contact person with authority to execute a contract on behalf of the proposer.

- b. Organizational experience including:
  - Information on the background of the firm or individual, including background information of any subcontractor(s)
  - Any prior experience relevant to this RFP (includes current contact names and phone numbers for these references), and a list of similar projects currently underway by the proposer or by any subcontractor(s) as well as completed over the past three (3) years. The Evaluation/Selection Review Committee will consider these additional references and may contact each of these sources. Evaluations of past performance as reflected by previous clients with respect to factors such as control of costs, quality of work, meeting of deadlines, and other similar factors.
  - Demonstrate how minimum qualifications specified in Part 2 Section V are met by the Contractor, and/or subcontractors.
- c. Technical Approach and work plan that indicates how the proposer plans to address the purpose, objectives and deliverables, within the timeframes as stated in this RFP.
  - A statement of the proposer's commitment to the scope of work.
  - A narrative response describing the proposer's competence to perform the required services as indicated by the training, education, and experience of the proposer's personnel, especially the training, education, and experience of the employee(s) who would be assigned to perform the service.
  - Describe the ability in terms of workload and availability of qualified personnel to perform the required services competently and expeditiously.
  - A narrative response describing how the Proposer would use its expertise to meet the deliverables and objectives outlined in the scope of work.
  - Provide evidence of successful implementation of services like the scope of work outlined, provided within the last twelve (12) months.
- d. Provide a statement of the organization's likelihood of success including how you will measure progress towards identified benchmarks as well as how you will identify and address any challenges, roadblocks, or barriers that may occur.

## **B. Cost Proposal**

The cost proposal must indicate the total cost for the entire project and a separate cost breakdown for the deliverables outlined in Part 2 Section IV.

Below are the not-to-exceed budget amounts the Agency has identified for the work to be completed in each fiscal year.

FY22 – Maximum budget \$92,000.00

FY23 – Maximum budget \$183,000.00

Travel cost should be encompassed within the cost of the deliverables. Travel is not to be listed separately. For purposes of this RFP, travel includes all modes of transportation (airfare, tax, car rentals, etc.), lodging expenses, meals, and cost of communications by phone, mail, e-mail, or fax.



### **III. PROPOSAL SUBMITTAL**

Proposals must be submitted in the following manner:

- **Proposals must be submitted via e-mail by no later than December 22, 2021 at 12:00 pm to [DMRProcurement@dodd.ohio.gov](mailto:DMRProcurement@dodd.ohio.gov).**
- Subject of email should be "Proposal - Blueprint System Finance & Rate Expert RFP"
- The technical proposal should be a **maximum of ten (10) pages**.
- All pages must be numbered consecutively using the format "Page [#] of [total number of pages]" (e.g., Page 2 of 20).
- Standard Affirmation and Disclosure form completed and submit with proposal
- Contractor Information form completed and submit with proposal

No proposals or corrections/additions to submitted proposals will be accepted after the Proposal Due Date. Proposals that are submitted after the Proposal Due Date will not be scored.

Proposals that are not submitted in the format requested will not be scored. Proposals that do not contain all of the required information will not be scored.

All costs incurred in the preparation of the Proposal shall be borne by the Proposer alone, and DODD shall not contribute, in any way, to the cost of the preparation of the Proposal.

Any and all documents developed by the Proposer during the course of this project will be provided to DODD upon request and will become the property of DODD, and the Proposer shall not assert any claims arising under copyright or otherwise inconsistent with the transfer of ownership of such documents.

All information submitted by the Proposer will be considered to be public information unless the proposer specifically demonstrates, in writing, which information it considers to be proprietary. "Proprietary information" is information which, if made public, would put the proposer at a disadvantage in the market place and trade in which the proposer is a part. Consequently, an assertion of "proprietary" information must be clearly identified and the basis of the assertion must be included. It is not adequate for the bidder to simply state that disclosure of the information will put it at a disadvantage in the market place. DODD will make the final decision as to whether information is "public" or "proprietary".

DODD reserves the right to:

- Accept or reject any and all Proposals and/or bids if DODD determines that it is in the best interests of the State to do so.
- Rebid this RFP, requesting new Proposals from qualified firms.
- Waive or modify minor irregularities in Proposals received.
- Negotiate with Proposer(s), within the requirements of this RFP, to best serve the interests of the State of Ohio.
- Require the submission of modifications or additions to Proposals as a condition of further participation in the selection process.
- Fund any Proposal in full or in part; any assignments of work by DODD under the scope of this RFP will be made dependent on need and the availability of adequate, specific funding.
- Not make an award at the end of the evaluation process; this RFP is not to be interpreted or construed to guarantee that one or more Proposers submitting responses will be

awarded contracts.

- Adjust the RFP Calendar of Event dates for whatever reason it deems appropriate.
- Contact Proposer to clarify any portion of the Proposer's submittal.

If, during the review process, DODD determines that it is necessary to make further distinctions between certain Proposers, DODD may request certain selected Proposers to interview or make a presentation to staff and reviewers. The Proposer shall bear the cost of travel to any scheduled interview.

In accordance with federal and state statutes and DODD policy, no person shall be excluded from participation or subject to discrimination in the RFP process on the basis of race, color, age, sex, national origin, military status, religion, or disability.

#### **IV. INQUIRIES**

From the issuance date of this RFP, until a contract is awarded to a proposer, there may not be communications concerning the RFP between any supplier who expects to submit a proposal and any employee of DODD involved in the issuing of the RFP. The only exception is provided through the submission of written requests for clarification/interpretation via the Ohio|Buys website during the inquiry period.

Every bidder or supplier contact must have an OH|ID to access Ohio|Buys and submit inquiries. An OH|ID is a secure single sign-on that provides users access to online services for multiple State of Ohio systems. The following rules dictate how Bidders and Supplier use OH|IDs to access Ohio|Buys:

- A valid OH|ID logon credential is required for each Bidder or Supplier contact
- Each user must provide a valid email address and password to request and create an OH|ID
- The email address used to create your OH|ID must match the email address associated with your Supplier contact record in Ohio|Buys

To access Ohio|Buys, navigate to <https://supplier-emarketplace.ohio.gov/> and then click on the Login button to be redirected to the Supplier Portal OH|ID security box. In the box, choose to either create an account and obtain your OH|ID or input your OH|ID and password to be returned to Ohio|Buys.

Prospective Proposers may make inquiries or seek clarifications regarding this RFP any time during the inquiry period listed in the RFP Calendar of Events. To make an inquiry, prospective Proposers must use the following process:

1. Access the Ohio|Buys website at <https://supplier-emarketplace.ohio.gov/> and log in.
2. From the Main Menu Navigation Bar at the top, select "Sourcing" and then select "View Public Solicitations" from the drop-down menu.
3. On this page, you can search for the RFP by multiple fields including the Solicitation ID, which is found on Page 1 of this document as the "Solicitation Number".
4. Click the blue "Search" button.
5. Once you find the solicitation you would like to review, click the Pencil icon next to the solicitation name.
6. If you have not previously viewed this solicitation, review the details across the various tabs and then click the Participate in RFx button at the top.
7. On the left side menu, navigate to the Inquiries tab.

8. The complete inquiry history for the solicitations will be displayed, to compose a new inquiry click the Compose button.
9. Complete all the required fields. The fields marked by a red asterisk (\*) are required. Once done click the Send button to send the inquiry to the State.

Prospective Proposers submitting inquiries will receive an immediate acknowledgement by e-mail that their inquiry has been received. **The prospective Proposer who submitted the inquiry will not receive an e-mail response to the question but will need to view the response on the Ohio|Buys website where it will be posted for viewing by all prospective Proposers.**

**DODD will try to respond to all properly posed inquiries within 48 hours, excluding weekends and state holidays. DODD will not respond to any inquiries received after 12:00 p.m. on December 22, 2021.** Prospective Proposers who attempt to seek information or clarifications verbally will be directed to reduce their questions to writing in accordance with the terms of this RFP and state purchasing policy. No other form of communication is acceptable, and use of any other form of communication or any attempt to communicate with DODD staff or any other agency of the State to discuss this RFP may result in the Proposer being deemed ineligible.

## **PART FOUR: EVALUATION OF PROPOSALS**

### **I. EVALUATION PROCESS**

DODD's evaluation process of responses submitted to this request may consist of up to four distinct phases:

1. DODD's initial review of all proposals for timely submission;
2. An evaluation committee review of the proposals for defects and scoring;
3. DODD's request for more information (clarifications, interviews, presentations, and/or demonstrations); and,
4. Negotiations or best offer requests.

At its sole discretion, DODD will determine whether phases three and/or four are necessary under this RFP, reserving for itself the ability to eliminate or add phases three or four at any time during the evaluation process. DODD may add or remove sub-phases to phases 2 through 4 at any time if DODD believes doing so will improve the evaluation process.

### **II. PROPOSAL EVALUATION CRITERIA**

In the proposal evaluation phase, DODD staff or reviewers selected by DODD (the committee) will rate the proposals submitted in response to this RFP based on the following criteria and weight assigned to each criterion.

<b>Evaluation Criteria</b>	<b>Weight</b>	<b>Rating</b>	<b>Extended Score</b>
Transmittal Letter	5		
Organizational Experience	20		
Technical Approach and Work Plan	45		
Measurement of Success & Overcoming Barriers	20		
Cost Proposal	10		
		<b>Total:</b>	

### **III. SCORING**

Each proposal will be scored, and numerical technical point values will be assigned according to the criteria listed below. The scale (0-5) will be used to rate each Proposal response to the RFP on the technical evaluation sections. The actual number values awarded may be higher or lower (not lower than 0 or higher than 5) based on the evaluation committee's determination. DODD will score the Proposals responses by multiplying the score received for each criterion by its assigned weight (points) and adding all categories together for the Offeror's total technical score.

A minimum average score of **270** must be achieved during the technical evaluation process to be considered for the contract.

DODD will apply Veteran Friendly Business Enterprise preference as required by ORC 9.318 and OAC 123:5-1-16. If the Offeror qualifies as a Veteran Friendly Business Enterprise as defined by ORC 9.318 and OAC 123:5-1-01 (KK), the offeror shall certify in the technical proposal the following:

*(Insert Company Name) affirms that they are certified as a Veteran Friendly Business Enterprise as defined by Ohio Revised Code 9.318 and Ohio Administrative Code 123:5-1-01 (KK).*

Technical Ratings Defined:

Point Value	Evaluation Criteria
0	<b>DOES NOT MEET:</b> Response description does not comply substantially with requirements or is not provided.
1	<b>WEAK:</b> Response description is poor related to meeting the objectives.
2	<b>WEAK TO MEETS:</b> Response description indicates the objectives will not be completely met or at a level that will be below average.
3	<b>MEETS:</b> Response description generally meets the objectives or expectations.
4	<b>MEETS TO STRONG:</b> Response description indicates the objectives will be exceeded.
5	<b>STRONG:</b> Response description significantly exceeds objectives or expectations in ways that provide tangible benefits or meets objectives or expectations and contains at least one enhancing feature that provides significant benefits.

**Cost Evaluation (scored after above criteria has been scored)**

Cost Criteria	Weight	Scoring Rubric
Cost of proposal to DODD Calculated as: (Offeror's Cost / Lowest Cost) x 100		1 = Over 130 2 = Between 120.1 – 130 3 = Between 110.1 – 120 4 = Between 100.1 – 110 5 = Lowest Cost

The evaluation committee will calculate the scoring by dividing the Proposal cost by the Lowest Cost Proposed multiplied by 100. For example, if a proposal cost was \$1,000 and the lowest cost proposed was \$800, the calculation  $(\$1,000/\$800) \times 100 = 125$ . That proposal would receive a score of 125 (or 2).

## **PART FIVE: CONTRACT AWARD**

### **I. CONTRACTUAL REQUIREMENTS**

Any contract(s) resulting from this issuance of this RFP are subject to the terms and conditions as provided in the personal services contract. The information contained in the RFP and in the proposal submitted by the selected contractor shall be considered part of the contract.

Payments for any and all services provided pursuant to the contract are contingent upon the availability of state and federal funds.

All aspects of the contract apply equally to work performed by any and all subcontractors.

The Contractor, and any subcontractor(s), will not use or disclose any information made available to them for any purpose other than to fulfill the contractual duties specified in the RFP. The Contractor, and any subcontractor(s), agrees to be bound by the same standards of confidentiality including federal and state statutory and regulatory requirements that apply to the employees of DODD and the State of Ohio.

Before a contract can be awarded, an Affirmative Action Program Verification Form must be completed using the Ohio Business Gateway Electronic filing website (<https://ohiobusinessgateway.ohio.gov>). Contractor must have an approved Affirmative Action plan recorded with the State of Ohio Department of Administrative Services.

### **II. CONTRACT AWARD PROCESS**

It is DODD's intention to award one or more contracts under the scope of this RFP and as based on the RFP Calendar of Events schedule, so long as DODD determines that doing so is in the State's best interests and DODD has not otherwise changed the award date.

Any award decision by DODD under this RFP is final. After DODD makes its decision under this RFP, all Contractors will be notified (in writing or by phone, at DODD's discretion) of the final evaluation and determination as to their Proposals.

DODD will issue a notice of contract award to the selected Contractor(s), and finalized contract terms and conditions will be forwarded for signature. Contract will include RFP and attachments and the Contractor's accepted proposal. Once executed copies of the contract are submitted by the Contractor(s), and pending any further approvals that may be required (e.g., State Controlling Board), DODD will fully execute the contract.

Once the contract is fully executed, DODD will issue a purchase order (PO). DODD will issue to the Contractor(s) one (1) copy of the signed instrument and one (1) copy of the PO for its/their files.

Unless otherwise negotiated and included in the executed contract/scope of work, the selected contractor(s) shall be bound by all outlined services, policies and procedures as contained in the contractor's submitted and evaluated proposal.

Contractor may commence work upon receipt of a state issued purchase order.

The selected contractor(s) shall be compensated based on deliverables listed in the RFP. The personal services contract issued will further specify the timelines for completion of each deliverable and payment structure.

**III. NUMBER OF AWARDS**

DODD anticipates making at least one award depending on programs' needs and the fit of the Contractor(s) to the scope of this RFP.

**IV. FUNDING APPROVAL THRESHOLD**

In the event that contractual expenditures with the selected Contractor(s) will exceed \$50,000 in spending under any contract that results from this RFP, or that otherwise exceed \$50,000 in aggregate spending across all contracts between the contractor and DODD, the contract will be subject to the approval of the State of Ohio Controlling Board.

# Appendix 1:

## Executive Order 2019-12D

*Governing the Expenditure of Public Funds for Offshore Services*

### **No Contract Funds May be Spent Offshore**

Executive Order 2019-12D “Governing the Expenditure of Public Funds for Offshore Services” prohibits the use of any public funds within the control of an executive agency to purchase services which will be performed outside of the United States. The Executive Order can be found at the following website:

<https://governor.ohio.gov/wps/portal/gov/governor/media/executive-orders/2019-12d>

To be considered by the DODD, a bid response must be accompanied by an Affirmation and Disclosure in the form attached to this RFP.



**STANDARD AFFIRMATION AND DISCLOSURE FORM -EXECUTIVE ORDER 2019-12D**  
Governing the Expenditure of Public Funds on Offshore Services

By the signature affixed hereto, Contractor affirms, understands and will abide by the requirements of Executive Order 2019-12D. Both Contractor and any of its subcontractors shall perform no services under any contract with the Department of Developmental Disabilities outside of the United States.

The Contractor shall provide all the name(s) and location(s) where services under any contract with the Department of Developmental Disabilities will be performed in the spaces provided below or by attachment. Failure to provide this information may subject the Contractor to sanctions. If the Contractor will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

**1. Name/Principal location of Contractor:**

\_\_\_\_\_  
(Name) (Address, City, State, Zip)

**2. Name/Principal location of subcontractor(s):**

\_\_\_\_\_  
(Name) (Address, City, State, Zip)

\_\_\_\_\_  
(Name) (Address, City, State, Zip)

**3. Location(s) where services will be performed by Contractor or by subcontractors if different from principal location(s):**

\_\_\_\_\_  
(Address, City, State, Zip)

\_\_\_\_\_  
(Address, City, State, Zip)

**4. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor or subcontractors if different from principal location(s):**

\_\_\_\_\_  
(Address, City, State, Zip)

\_\_\_\_\_  
(Address, City, State, Zip)

Contractor affirms that Contractor and all subcontractors shall immediately disclose to the Department of Developmental Disabilities any change or shift in location of services performed by Contractor or subcontractors after execution of any Contract with the Department. On behalf of the Contractor, I am duly authorized to execute this Affirmation and Disclosure form and have read and understand that this form is a part of any Contract that Contractor may enter into with the Department and is incorporated therein.

By: \_\_\_\_\_  
**Contractor Signature** **Printed Name and Title**

Date: \_\_\_\_\_

# Appendix 2:

## Contractor Information Form

*The Contractor Information Form must be filled out and returned with a bid response.*

## CONTRACTOR INFORMATION FORM

THIS FORM MUST BE SUBMITTED WITH YOUR PROPOSAL

CONTRACTOR NAME: \_\_\_\_\_

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

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

AUTHORIZED CONTACT NAME: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**1. Identify all of contracts currently with the State of Ohio (including DODD).**

Total # of Contracts: \_\_\_\_\_

State Agency: \_\_\_\_\_ Amount: \_\_\_\_\_

Contracted Services: \_\_\_\_\_

Duration of Contract: \_\_\_\_\_

(Attach additional sheets if necessary.)

**2. Provide current employee information on both a nationwide basis (including Ohio), and Ohio's based operations.**

**NATIONWIDE**

**OHIO**

Total # of Employees: \_\_\_\_\_

Percent of Women: \_\_\_\_\_

Percent of Minorities: \_\_\_\_\_

**3. Provide OAKS Supplier ID or Tax Identification Number: \_\_\_\_\_**

**4. If your billing address is different than mailing address above, please provide below:**

Contractor Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

\_\_\_\_\_  
**Authorized Signature**

\_\_\_\_\_  
**Date**