

## Table of Contents

Section	Page
A) Purpose and Description of Services.....	3
B) Minimum Qualifications for Proposers .....	6
C) Proposal Requirements and Information.....	6
1) Key Action Dates.....	6
2) Electronic Q&A.....	6
3) Work plan and Work Schedule Requirements.....	6
4) Cost Detail Format and Requirements.....	7
5) Submission of Proposal.....	8
6) Evaluation Process.....	9
7) Award and Protest.....	11
8) Disposition of Proposals.....	12
9) Agreement Execution and Performance.....	12
D) Preference Programs.....	13
1) Small Business Preference.....	13
E) Required Attachments.....	13
1) Required Attachment Check List.....	14
2) Proposal/Proposer Certification Sheet.....	15
3) Sample Cost Proposal Work Sheet.....	17
4) Proposer References.....	18
5) Payee Data Record (STD 204)** available on the Internet at <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a>	
6) Contractor's Certification Clauses (CCC) (page 1)** available on the Internet at <a href="http://www.ols.dgs.ca.gov/Standard+Language">www.ols.dgs.ca.gov/Standard+Language</a> .	

\*\*These documents are not required with the Proposal package but are required upon award of the contract.

## **A) Purpose and Description of Services**

The purpose of this Request for Proposal (RFP) is to seek qualified proposers who demonstrate the capability to provide facilitation support services for the State Council on Developmental Disabilities (SCDD), Self-Advocates Advisory Committee (SSAC), a Statewide Self-Advocacy Network (SSAN) and for self-advocate members of the SCDD Employment First Committee (EFC). SCDD is soliciting proposals to contract with an organization that meets all of the criteria set forth in this RFP.

### **1. Background**

#### **1a. Self-Advocates Advisory Committee (SSAC)**

The SSAC, a newly formed committee comprised of current self-advocate members of the Council studies issues important to the lives of people with intellectual/developmental disabilities and provides insight and recommendations to the Council. The committee's platform of "nothing about us without us" guides their actions and relationship with the SCDD. The SSAC focuses on SCDD state plan strategies to increase self/peer advocacy, improve quality of life, personal leadership, and policies that support greater self-determination for people with intellectual disabilities.

#### **1b. Employment First Committee (EFC)**

The EFC, a newly formed committee brought forward a policy recommendation to SCDD to increase employment for persons with intellectual/developmental disabilities in California. The EFC composition includes self-advocates that would benefit from meeting preparation and facilitation during policy discussions. To ensure persons intellectual/developmental disabilities have an active and sustained voice during the ongoing committee meetings, SCDD is requesting facilitation support, material adaptation, preparation team meeting and post meeting follow-ups.

#### **1c. Self-Advocacy Network (SSAN)**

SSAN is a newly formed statewide peer advocacy network that links advocates, communities and statewide leadership together through the SCDD, area boards and existing advocacy channels. By working together under the SCDD strategic plan, SSAN members and their communities identify advocacy interests and needs, create and implement support plans and share insight at quarterly SSAN meetings to provide peer mentoring and move advocacy efforts forward in California. Through the SCDD sponsored SSAN, leadership and advocacy strategies reach individuals in their community through a multi-year community based outcome driven plan. The SSAN addresses ongoing and evolving local and statewide advocacy interests in a practical approach that reflects interests and needs of the people they represent.

### **2. Program Description**

#### **2a. Self-Advocates Advisory Committee (SSAC)**

SSAC development/facilitation;

- Facilitate and provide training on committee structure and organization,
- Provide format and structure for SSAC to develop annual strategic goals,
- Facilitate community engagement and member responsibilities,
- Provide leadership, governance and meeting structure training to committee leadership,
- Provide coaching, facilitation and coaching for SSAC chair at SSAN meetings.

SSAC meetings (six per full year);

- Facilitate agenda development and achievement of meeting goals,
- Provide ongoing member leadership training, development and coaching,
- Preparation for SCDD meeting: topic review, accessible materials and preparation,
- Facilitation of committee and member follow-thru on goals and objectives,
- Support SSAC members at SCDD meetings (six per full year)
- Monitor goal and action planning process and outcome delivery.

SSAC meeting materials;

- Adapt core SCDD meeting materials (directed by SCDD Executive Director),
- Prepare SSAC Chairperson and members' reports for SCDD meeting,
- Provide facilitation and training tools: advocacy and leadership strategies,
- Deliver meeting materials to SCDD for SSAC webpage.

SSAC strategic plan;

- Provide accessible committee goal and action template,
- Facilitate long/short terms SSAC goals, plans and action items,
- Member participation, community outreach,
- Support SSAC collaboration with SSAN.

Monthly leadership coaching for each SSAC member;

- Guide members to create mission, goal, and action plan,
- Facilitate member defined annual outcomes,
- "Leadership by example" role in SSAN
- Leadership planning, coaching, facilitation at each SSAC meeting.

Conduct annual facilitation training (meeting or web based sessions) for members and their facilitators;

- Learn about SCDD facilitation guide and typical support practices,
- Learn how to use and apply facilitation plan,
- Identify facilitator learning needs and plan for improvement.

Annual review of SSAC action items, progress and outcomes;

- Reset priorities and identify strengths, challenges and assist committee with new strategies,
- Develop and deliver annual accessible report to SCDD.

## **2b. Employment First Committee (EFC), Self-Advocate Members**

Preparation and facilitation (four meetings a year);

- Conduct in-person and/or phone preparation meeting for peer advocates prior to EFC - meetings,
- Develop EFC meeting preparation materials,
- Facilitate individual information sessions in-person or via telephone for interested advocacy and facilitators,
- Develop annual self-advocate data collection process for use at meetings,
- Attend and support EFC self-advocate members at EFC meetings,
- Conduct post meeting web/phone follow-up sessions.

EFC meeting and preparation;

- Adapt EFC meeting materials and distribute to peer advocate members (directed by SCDD Executive Director),
- Provide EFC committee meeting facilitation for advocates members,
- Deliver EFC preparation meeting materials to SCDD for use on website.

Develop annual video and booklet highlighting self-advocate EFC perspective and achievements,

- Deliver media in format for posting to website.

## **2c. Statewide Self Advocacy Network (SSAN)**

Provide quarterly one day trainings each calendar year designed to develop and implement the SCDD statewide advocacy plan, including the importance of community outreach and engagement. Trainings are to be designed using numerous formats that include facilitated skill building exercises, PowerPoint and media presentations, team building and participant initiated activities (small group facilitated discussions, working through a pre-determined challenge and/or a follow-up activity). SSAN members will receive orientation/practice with web-based communications. SSAN members will report on progress and implementation of leadership goals.

Planning with SSAN Officers and SCDD;

- Assist SSAN elected Chairperson and SCDD in developing agenda to assure focused, outcome driven meetings
- Arrange guest speakers for meetings,
- Support members and their facilitators to prepare quarterly reports about community needs, leadership development and implementation of SCDD goals,
- Coordinate leadership coaching trainings and presentations by a certified life coach to support members to identify community action plans.

Assist members participating in meetings;

- Provide mentoring support to members' facilitators at meeting to clarify their role and develop techniques to meet each member's needs,
- Guide members on successful meeting preparation practices that assure all members are respected and accomplish SSAN goals.

## **2c. SSAN Community/Statewide Engagement**

### Community Onsite or Web-Based Support

To effectively support SSAN members and their facilitators, the proposer shall make community visits (on-site or web-based). Coaches will provide guidance to members and/or facilitators during visits and provide follow up coaching, as needed. Strategies include coaching, mentoring, adaptations or plan development or implementation. Community visits are designed to provide continuity for members and their sponsoring agencies, assistance with community outreach and leadership plans.

### Advocacy Presentations

To carry-out a statewide advocacy plan and increase leadership, the SSAN will share effective strategies with local and statewide advocacy groups. The proposer will assist members by preparing templates that can be used at community presentations. Support members to identify opportunities at statewide conferences, local groups, regional center advisory committees, developmental centers and typical community events.

### Leadership Project Coaching for SSAN Members

The proposer will provide members with ongoing leadership coaching (similar to SSAC) to develop and implement leadership advocacy goals. Once members develop their mission statements and select a leadership priority, the leadership coach, will encourage and facilitate strategy development and outreach using a similar approach in each members respective community. Quarterly training and scheduled coaching sessions will focus on mission accomplishments and advocacy strategies that support the statewide advocacy plan.

### Community Mentors

Mentoring is a dynamic, reciprocal relationship that focuses on personal and/or professional development. Mentors provide perspective, resources, ask thought provoking questions and learn and teach each other. Once SSAN members create their advocacy mission statement, develop goals and identify an area of leadership they want to pursue, the proposer will support each member to identify a community mentor to provide network contacts to further leadership and SSAN goals.

### Easy-Access Webpage and online Communication

The proposer will develop an easy to use webpage and communication blog for SSAN and SCDD SSAC and EFC self-advocate members that will house leadership and advocacy resources used during trainings for community presentations and access. Specific "member only" section will provide notes and log for members to record progress between meetings for each respective group.

### Online Communication

Introduce and use online technology to increase communication between meetings, members and agencies.

### Documenting Success Annually

With support from the proposer, SSAN members and SCDD will produce an annual video and booklet highlighting the strategic plan, annual achievements, process and outcomes to communicate the path SSAN is using to increase advocacy, engagement in policy development and "nothing about us without us."

### 3. Bid Elements/Deliverables

Contractor will bear all expenses related to the project including Contractor travel, per diem and related expense to successfully fulfill all requirements listed Program Description.

#### B) Minimum Qualifications for Proposers

The proposer must demonstrate an ability to meet the requirements as set forth and must produce evidence of experience and expertise in working with people with developmental disabilities in the areas that follows:

- Education
- Facilitation and training
- Leadership modeling, professional coaching
- Creating accessible material and technical adaptations in multi-media formats
- Translation and interpretation of conceptual information into plain language
- Providing technical assistance to self-advocate groups/committees
- Training of facilitators

#### C) Proposal Requirements and Information

##### 1. Key Action Dates

<u>Event</u>	<u>Date</u>
RFP available to prospective proposers	January 23, 2012
Written Question Submittal Deadline	January 30, 2012 no later than 4:00 pm
Final Date for Proposal Submission	February 6, 2012 no later than 4:00 pm
Cost Proposal Opening	February 10, 2012 at 1:00 pm at 1507 21 <sup>st</sup> Street, Room 210
Notice of Intent to Award	February 13, 2012
*Proposed Award Date	February 24, 2012
Anticipated Funding of Awarded Proposal	March 01, 2012 – September 30, 2014

\*Pending completion of the Protest Period

##### 2. Electronic Q&A for this RFP

For the purpose of discussing questions or concerns regarding this RFP, e-mails may be sent to Kristie Allensworth, \*any time before, and up January 30, 2012. Send your e-mails to [kristie.allensworth@scdd.ca.gov](mailto:kristie.allensworth@scdd.ca.gov). In order to ensure fairness, all questions regarding this RFP will be shared via e-mail with a contact person at each of the agencies/organizations requesting RFP packets. Answers to questions will be sent to prospective proposers on or before January 30, 2012. Please e-mail Kristie Allensworth your email address by January 26, 2012, in order to ensure that your firm receives **all** answers to questions.

##### 3. Work Plan and Work Schedule Requirements

Proposer shall submit as part of its Proposal Narrative a detailed work plan indicating all tasks and work to be completed and time lines for all major activities. All proposals must include each of the items below, as well as the items identified on the Checklist (Attachment 1) and be responsive to the RFP. Sample work products will not be considered in lieu of a narrative description.

###### a. Cover Sheet and Table of Contents

- All proposals shall contain a cover sheet.
- A Table of Contents is required and shall include all sections identified with all pages clearly and consecutively numbered.

**b. Statement of Purpose/Overall Approach**

In no more than two double-spaced, typewritten pages (12-point Arial font), the proposer shall describe its understanding of the scope of the contract and the overall approach to carrying out the provisions of the contract. Include a brief description of proposer's organization, the program services to be provided, and the methods proposed to meet and evaluate program services.

**c. Proposal Narrative**

- The proposer shall provide a list of prior work experience and education which demonstrates the knowledge, skills, and abilities needed to accomplish the deliverables in this RFP.
- The proposer shall demonstrate the capability to work cooperatively with self-advocate groups and organizations in the developmental disabilities field including committees, boards, self-advocacy groups, and/or families. The proposer shall provide a listing of verifiable experience from these organizations for the most recent two years of experience.
- The proposer shall provide a verifiable listing of publications and/or products developed by the proposer for self-advocates.

**d. Proposed Methodology**

In this section of the Proposal Narrative, the proposer shall provide a detailed description of how it intends to carry out the duties outlined in this RFP.

**e. Detailed Work Plan**

Proposer shall submit as part of its Proposal Narrative a detailed work plan indicating all tasks and work to be completed including:

- Project Personnel (List personnel who will be working on the project and their titles)

**f. Sample Product**

The Proposer shall submit with the RFP, a sample product which illustrates the ability to adapt materials for self-advocates in easily understood formats.

**4. Cost Detail Format and Requirements**

The proposed work should be broken down into the outline in Work Plan and Work Schedule for the purpose of this proposal. Use the Sample Cost Proposal Worksheet (Attachment 3) as a guide in preparing your cost proposal.

## 5. Submission of Proposal

- a. Proposals should provide straightforward and concise descriptions of the proposer's ability to satisfy the requirements of this RFP. The proposal must be complete and accurate. Omissions, inaccuracies or misstatements will be sufficient cause for rejection of a proposal.
- b. The proposal package should be prepared in the least expensive method.
- c. All proposals must be submitted under **sealed** cover and sent to **State Council on Developmental Disabilities** by dates and times shown in Section C, Proposal Requirements and Information, Item 1) Time Schedule, (page 6). Proposals received after this date and time will not be considered.
- d. A minimum of **3** copies of the proposal must be submitted.
- e. The original proposal must be marked "ORIGINAL COPY". All documents contained in the original proposal package must have original signatures and must be signed by a person who is authorized to bind the proposing firm. All additional proposal sets may contain photocopies of the original package.
- f. The proposal envelopes must be plainly marked with the RFP number and title, your firm name and address, and must be marked with "DO NOT OPEN", as shown in the following example:

**State Council on Developmental Disabilities**  
**1507 21<sup>st</sup> Street, Suite 210**  
**Sacramento, CA 94811**  
**Attention: Kristie Allensworth**

### **DO NOT OPEN**

If the proposal is made under a fictitious name or business title, the actual legal name of proposer must be provided.

**The bid price and all cost information must be submitted in a separate sealed envelope. The envelope should be affixed to the outside of the proposal package and marked "Sealed Cost Proposal-DO NOT OPEN".**

Proposals not submitted under sealed cover and marked as indicated may be rejected.

- g. All proposals shall include the documents identified in Section E, Required Attachment Checklist (see page 14). Proposals not including the proper "required attachments" shall be deemed non-responsive. A non-responsive proposal is one that does not meet the basic proposal requirements.
- h. Mail or deliver proposals to the following address:  
  
**State Council on Developmental Disabilities**  
**Attn: Kristie Allensworth**  
**1507 21<sup>st</sup> Street, Room 210**  
**Sacramento, CA 95811**
- i. Proposals must be submitted for the performance of all the services described herein. Any deviation from the work specifications will not be considered and will cause a proposal to be rejected.
- j. A proposal may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. The State may reject any or all proposals and may waive any immaterial deviation in a proposal. The State's waiver of immaterial deviation shall in no way modify the RFP document or excuse the proposer from full compliance with all requirements if awarded the agreement.

- k. Costs incurred for developing proposals and in anticipation of award of the agreement are entirely the responsibility of the proposer and shall not be charged to the State of California.
- l. An individual who is authorized to bind the proposing firm contractually shall sign the Attachment 2, Proposal/Proposer Certification Sheet, page 14. The signature must indicate the title or position that the individual holds in the firm. An unsigned proposal may be rejected.
- m. A proposer may modify a proposal after its submission by withdrawing its original proposal and resubmitting a new proposal prior to the proposal submission deadline as set forth in the Key Action Dates. Proposal modifications offered in any other manner, oral or written, will not be considered.
- n. A proposer may withdraw its proposal by submitting a written withdrawal request to the State, signed by the proposer or an authorized agent in accordance with l) above. A proposer may thereafter submit a new proposal prior to the proposal submission deadline. Proposals may not be withdrawn without cause subsequent to proposal submission deadline.
- o. The awarding agency may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum to all parties who received a proposal package.
- p. The awarding agency reserves the right to reject all proposals. The agency is not required to award an agreement.
- q. Before submitting a response to this solicitation, bidders should review, correct all errors and confirm compliance with the RFP requirements.
- r. Where applicable, proposer should carefully examine work sites and specifications. No additions or increases to the agreement amount will be made due to a lack of careful examination of work sites and specifications.
- s. The State does not accept alternate contract language from a prospective contractor. A proposal with such language will be considered a counter proposal and will be rejected. The State's General Terms and Conditions (GTC) are not negotiable.
- t. No oral understanding or agreement shall be binding on either party.

## **6. Evaluation Process**

- a. At the time of proposal opening, each proposal will be checked for the presence or absence of required information in conformance with the submission requirements of this RFP.
- b. Proposals that contain false or misleading statements, or which provide references, which do not support an attribute or condition claimed by the proposer, may be rejected.
- c. The final selection will be made to the lowest monetary responsible proposer achieving a passing score, after application of preferences.
- d. **Phase I**

The proposals that meet the minimum qualifications will be evaluated and scored according to the criteria indicated below. A minimum of 85 points must be achieved in this phase to be considered responsive. (A responsive proposal is one, which meets or exceeds the requirements stated in this RFP.)

**Rating/Scoring Criteria**

**Maximum Possible Points**

**PROPOSAL REVIEW AND EVALUATION CRITERIA**

Meeting the Purposes as Specified in the Request for Proposals.....10

**(1) Review the proposal for the overall quality and completeness of the proposal.**

- How well does the proposal clearly state what is being proposed and how the services and deliverables will be accomplished?
- Are the objectives and timelines of the deliverables clearly stated and measurable?
- How will the proposed methodology further the purposes of the SSAC, EFC and SSAN?
- Does the proposal clearly set forth in narrative form what is being proposed?
- Are the proposal and attachments organized and displayed as instructed in the RFP?
- Are all work plan and schedule requirements as specified in the RFP included?

Overall Approach.....20

**(2) Review the proposal to determine the extent to which the proposal meets the specific identified deliverables to provide support, facilitation, and training to the SSAC, EFC and SSAN at meetings, in their home communities and for the Leadership project which is appropriate, realistic and feasible.**

- Has the proposal clearly stated how the specific elements of the required deliverables for the SSAC, EFC and SSAN meetings, the home communities, and the Leadership project will be met?
- How well does the proposal demonstrate its approach to assist the members in developing all SSAC, EFC and SSAN materials and training curriculums?
- Does the proposal demonstrate its intent to assist members with outreach to other consumer groups and agencies?
- Does the plan demonstrate its intent to develop all materials in plain language using various modalities to meet the needs of the greatest number of consumers?

Facilitation and Training at SSAC, EFC and SSAN Meetings.....15

**(3) Determine the quality of the plan for facilitation and training at the SSAC, EFC and SSAN meetings in the proposal.**

- Are the facilitation and training objectives of the proposal clearly stated and related to the purpose of the SSAC, EFC and SSAN meetings?
- Does the proposal adequately address the planning and development phase of the meeting agenda and materials?
- Does the proposal clearly describe its plan to work with the members in the development of the agenda and training materials?
- Does the proposal identify plans to produce all meeting and training materials in adapted formats?
- Does the proposal identify unique approaches/training techniques to facilitate the agenda topics including any relevant guest speakers?

Community Facilitation .....15

**(4) Determine the quality of the plan for ongoing community facilitation, training, and coaching of the members, including outreach to consumer groups and other agencies.**

- Determine if the proposal's methodology for facilitation of members in their home communities is realistic and adequate.
- How well does the proposal identify strategies to support members in their communities to achieve SSAC, EFC and SSAN assignments, personal goals, and develop mentor relationships?

- How well does the proposal identify plans to assist members with community outreach to accomplish product field testing, training of new materials, and presentations?
- How well does the proposal identify strategies to recruit member facilitators and community mentors?

Leadership Project Development .....15

**(5) Determine the proposer’s ability to work with the SSAC, EFC and SSAN to plan, develop, and execute the Leadership Project objectives and materials.**

- How well does the proposal describe its overall plan to provide timely development of the Leadership Project core areas curriculum and training; and the publication of the draft and final booklets and DVDs?
- Does the plan include strategies to work with consumers in coaching and skill building?
- Does the plan include strategies for assisting the members in outreach with other consumer groups for the purpose of field testing and product development of the materials?
- Does the plan clearly identify a plan to assist the members with presenting components of the Leadership Project at conferences/presentations?

Review of Sample Product .....10

**(6) Review each sample product to determine the extent to which the product uses plain language or adaptive modalities.**

- Does the product use language, adapted formats, or graphics that are in plain language and easily understood?
- Is the product content consistent with SSAC, EFC and SSAN publications or is directly related to the objectives of the SSAC, EFC and SSAN?
- Does the product use a multiple modalities or formats to reach both consumers and their facilitators?

Bidder’s Qualifications.....15

**(7) General background of the organization in working with consumers and public or private agencies providing services to people with developmental disabilities.**

- Does the proposal provide evidence of work and educational experience skills in providing training, coaching, and facilitation to self-advocates?
- Does the proposal describe its experience and/or capability in working with self advocacy groups, provider groups, and/or agency committees and boards?
- Does the proposal describe its experience and/or capability in working cooperatively with constituency groups, including self-advocacy representatives?
- Does the proposal describe its experience and/or capability in maintaining working relationships and cooperative agreements with other organizations and/or individuals?
- Are there additional qualifications, not included above, that pertain to the proposer’s ability to provide comprehensive facilitation, training, and product development for the SSAC, EFC and SSAN? What are they?

**TOTAL POSSIBLE POINTS: 100**

**e. Phase II**

This phase consists of opening and evaluating the sealed cost proposals. All proposals that enter Phase II will have received 85 points or more and are considered fully capable of performing the required services. The sealed envelopes containing the bid price and cost information for the proposals that meet the format requirements and standards shall then be publicly opened and read. The agreement will be awarded to the lowest responsible bidder meeting the requirements outlined in this RFP.

**7. Award and Protest**

- a. Notice of the proposed award shall be posted in the lobby of the SCDD, located at 1507 21<sup>st</sup> Street, Suite 210, Sacramento, CA 95814, for five (5) working days prior to awarding the agreement.
- b. If any proposer, prior to the award of agreement, files a protest with the 1507 21<sup>st</sup> Street, Suite 210, Sacramento, CA 95814, on the grounds that the (protesting) proposer would have been awarded the contract had the agency correctly applied the evaluation standard in the RFP, or if the agency followed the evaluation and scoring methods in the RFP, the agreement shall not be awarded until either the protest has been withdrawn or the SCDD has decided the matter. It is suggested that you submit any protest by certified or registered mail.
- c. Upon resolution of the protest and award of the agreement, Contractor must complete and submit to the awarding agency the Payee Data Record (STD 204), to determine if the Contractor is subject to state income tax withholding pursuant to California Revenue and Taxation Code Sections 18662 and 26131. This form can be found on the Internet at [www.osp.dgs.ca.gov](http://www.osp.dgs.ca.gov) under the heading FORMS MANAGEMENT CENTER. No payment shall be made unless a completed STD 204 has been returned to the awarding agency.
- d. Upon resolution of the protest and award of the agreement, Contractor must sign and submit to the awarding agency, *page one (1)* of the Contractor Certification Clauses (CCC), which can be found on the Internet at [www.dgs.ca.gov/contracts](http://www.dgs.ca.gov/contracts).

**8. Disposition of Proposals**

- a. Upon proposal opening, all documents submitted in response to this RFP will become the property of the State of California, and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public.
- b. Proposal packages may be returned only at the proposer's expense, unless such expense is waived by the awarding agency.

**9. Agreement Execution and Performance**

- a. Service shall start not later than **60** days, or on the express date set by the awarding agency and the Contractor, after all approvals have been obtained and the agreement is fully executed. Should the Contractor fail to commence work at the agreed upon time, the awarding agency, upon five (5) days written notice to the Contractor, reserves the right to terminate the agreement. In addition, the Contractor shall be liable to the State for the difference between Contractor's Proposal price and the actual cost of performing work by another contractor.
- b. All performance under the agreement shall be completed on or before the termination date of the agreement.

**D) Preference Programs**

1. Small Business preference - [www.pd.dgs.ca.gov](http://www.pd.dgs.ca.gov)

**E) Required Attachments**

Refer to the following pages for additional Required Attachments that are a part of this agreement.

**ATTACHMENT 1**

**REQUIRED ATTACHMENT CHECK LIST**

A complete proposal or proposal package will consist of the items identified below.

Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.

<u>Attachment</u>	<u>Attachment Name/Description</u>
_____ Attachment 1	Required Attachment Check List
_____ Attachment 2	Proposal/Proposer Certification Sheet
_____ Attachment 3	Cost Sheet
_____ Attachment 4	Proposer References
_____ Attachment 5	Payee Data Record (STD 204) The Payee Data Record can be found on the Internet at <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a> .
_____ Attachment 6	Contractor Certification Clauses (CCC). The CCC can be found on the Internet at <a href="http://www.ols.dgs.ca.gov/Standard+Language">www.ols.dgs.ca.gov/Standard+Language</a> .

**ATTACHMENT 2**

**PROPOSAL/PROPOSER CERTIFICATION SHEET**

This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package in duplicate with original signatures. The proposal must be transmitted in a sealed envelope in accordance with RFP instructions.

**Do not return Section C, Proposal Requirements and Information (pages 3 through 11) of this RFP.**

**For RFP Primary Only:**

- A. Our all-inclusive cost proposal is submitted in a sealed envelope marked "**Cost Proposal - Do Not Open**".
- B. Place all required attachments behind this certification sheet.
- C. The signature affixed hereon and dated certifies compliance with all the requirements of this proposal document. The signature below authorizes the verification of this certification.

**An Unsigned Proposal/Proposer Certification Sheet May Be Cause For Rejection**

1. Company Name	2. Telephone Number (   )	2a. Fax Number (   )
3. Address		
Indicate your organization type:		
4. <input type="checkbox"/> Sole Proprietorship	5. <input type="checkbox"/> Partnership	6. <input type="checkbox"/> Corporation
Indicate the applicable employee and/or corporation number:		
7. Federal Employee ID No. (FEIN)	8. California Corporation No.	
9. Indicate applicable license and/or certification information:		
10. Proposer's Name (Print)	11. Title	
12. <b>Signature</b>	13. Date	
14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:		
a. California Small Business Enterprise Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, enter certification number: _____	b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, enter your service code below: _____	
<b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is checked " <b>Yes</b> ". Date application was submitted to OSBCR, if an application is pending:		

**ATTACHMENT 2 (Cont.)**

**Completion Instructions for Proposal/Proposer Certification Sheet**

Complete the numbered items on the

Proposal/Proposer Certification Sheet by following the instructions below.

<b>Item Numbers</b>	<b>Instructions</b>
<b>1, 2, 2a, 3</b>	Must be completed. These items are self-explanatory.
<b>4</b>	Check if your firm is a sole proprietorship. A sole proprietorship is a form of business in which one person owns all the assets of the business in contrast to a partnership and corporation. The sole proprietor is solely liable for all the debts of the business.
<b>5</b>	Check if your firm is a partnership. A partnership is a voluntary agreement between two or more competent persons to place their money, effects, labor, and skill, or some or all of them in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them. An association of two or more persons to carry on, as co-owners, a business for profit.
<b>6</b>	Check if your firm is a corporation. A corporation is an artificial person or legal entity created by or under the authority of the laws of a state or nation, composed, in some rare instances, of a single person and his successors, being the incumbents of a particular office, but ordinarily consisting of an association of numerous individuals.
<b>7</b>	Enter your federal employee tax identification number.
<b>8</b>	Enter your corporation number assigned by the California Secretary of State's Office. This information is used for checking if a corporation is in good standing and qualified to conduct business in California.
<b>9</b>	Complete, if applicable, by indicating the type of license and/or certification that your firm possesses and that is required for the type of services being procured.
<b>10,11 12, 13,</b>	Must be completed. These items are self-explanatory.
<b>14</b>	If certified as a California Small Business, place a check in the "yes" box, and enter your certification number on the line. If certified as a Disabled Veterans Business Enterprise, place a check in the "Yes" box and enter your service code on the line. If you are not certified to one or both, place a check in the "No" box. If your certification is pending, enter the date your application was submitted to OSBCR.

**ATTACHMENT 3**

**SAMPLE COST PROPOSAL WORKSHEET**

SAMPLE BUDGET FOR March 2012– October 2014

Line Item	2011- 2012	2012- 2013	2013- 2014	Total
<b>A. Personnel Services</b>				
Salaries hours x hourly rate				
(list all staff)				
Temporary Help				
Staff Benefits				
<b>Total Personnel Services</b>				
<b>B. Consultants/Subcontractors</b>				
(Costs Itemized)				
<b>Total Subcontractors</b>				
<b>C. Travel Costs</b>				
Travel related to contract				
<b>Total Travel Costs</b>				
<b>D. Operating Costs</b> (Not included in Administrative Overhead E.)				
(Itemize per line item)				
<b>Total Operating Costs</b>				
<b>E. Administrative Overhead</b>				
<b>TOTAL CONTRACT</b>				

**ATTACHMENT 4**

**PROPOSER REFERENCES**

Submission of this attachment is **mandatory**. Failure to complete and return this attachment with your proposal **will** cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

**REFERENCE 1**

Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

**REFERENCE 2**

Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

**REFERENCE 3**

Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

This page intentionally left blank