



**The Southwest Ohio Region
WORKFORCE INVESTMENT BOARD**

**REQUEST FOR QUALIFICATIONS AND QUOTATIONS
FOR ADMINISTRATIVE AND OFFICE SERVICES**

Bid Date: January 27, 2017

Pre-bid Conference: February 13, 2017, Noon, Great Oaks, 100 Scarlet Oaks Drive, Building 100

Deadline for Receipt of Response: 4:00 p.m. February 17, 2017

The Southwest Ohio Region Workforce Investment Board invites you to submit a written proposal to provide Administrative and Office Services. This work will be by 1099. Bidder can submit based on an hourly rate basis for which no taxes or withholdings will be covered by the SWORWIB or by a monthly charge. Payment will be monthly, with an invoice of services submitted by the 10th of each month.

Background

The Southwest Ohio Region Workforce Investment Board (SWORWIB) is a 12 year-old 501(c)3 non-profit entity in the State of Ohio under contract with Hamilton County and the City of Cincinnati to provide business leadership and oversight of the use of Workforce Innovation and Opportunity Act of 2014 (WIOA) dollars for the development, maintenance and improvement of the public workforce development system. The SWORWIB board is comprised of 50 board members with 51% business representatives and the remaining public, nonprofit community and other partners. There are seven committees to be managed throughout the year with different meeting schedules. The SWORWIB office activities span the board work, grant applications, marketing, newsletters, special projects, responding to audits and other business required activities for implementing core efforts. The SWORWIB is funded with federal (WIOA) dollars that are funneled through the State of Ohio to various counties and municipalities which then subcontract through the Local Workforce Area (LWA) which, in this case, is Ohio Area #13, serving the City of Cincinnati and Hamilton County. The SWORWIB is the provider of WIOA programs in this LWA. The entity has a One Stop Employment Center known as the Ohio Means Jobs Center of Cincinnati and Hamilton County and located at 1916 Central Parkway. The OMJ Center facility is three full floors, 45,000 square-feet with an adjacent two-story parking structure. The SWORWIB has a lease with Hamilton County as part of a state based Memorandum of Understanding for multi-agency participation in facility costs which the SWORWIB negotiates and manages. The SWORWIB is also funded with private and foundation resources.

Administrative and Office Services

The SWORWIB has a small team of only a couple of staff and specialist contractors to minimize public funds dedicated to administrative costs rather than direct service delivery to employers and jobseekers and youth both in-school and out-of-school. We are also assisting the State of Ohio with the new Kasich initiative known as the Comprehensive Case Management Employment Program refocusing public support resources on educational completion and employment training.

Working with specialist contractors has been very successful so we are now seeking that kind of assistance for our administrative and office services. We expect interested bidders to be able to produce the necessary work products on a less than 30 hours a week schedule and could utilize two or more individuals for certain activities thereby being highly focused on getting the work completed and kept updated while the President and other contract staff are primarily in and out of the office for their priority activities. These services are expected to keep the SWORWIB highly functional, technically updated in soft and hard copy files and well-planned for all efforts.

The quote summary on page two and certification on page two must be completed and signed as the front page of your proposal submission.

WE QUOTE YOU AS INDICATED ON THIS ATTACHED REQUEST FOR QUOTATION

Individual Contractor or Firm Name: _____ Date _____

Signature: _____ Title _____

Quotation Amount: Year 1: _____ 2 _____ 3 _____ Date: _____

CERTIFICATION OF BID QUOTATION AND/OR VENDOR
(Required to submit with Bid)

I certify this bid/quotation is not made in connection with any other bidder submitting a bid for the same commodity(s) and this bid is in all other respects fair and without collusion, fraud or conflict of interest.

I additionally certify, by affixing by signature below and submission of this bid/quotation, or proposal, that neither I nor my principals are presently disbarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal or State department or agency.

I hereby certify and verify that the establishment/facility/individual business person making this bid/quotation does not discriminate on the basis of sex, race, color, religion, ancestry, national origin or disability.

Concerning the certifications above, if you are unable to certify to any of the statements in this certification, attached an explanation to your bid/quotation, proposal or vendor application.

Signature: _____

Date: _____

Printed Name and Title:

REQUEST FOR QUALIFICATIONS AND QUOTATIONS

Please quote on the following services and mail or deliver your hard copy response as soon as possible and no later than 3:00 p.m. March 1, 2017 to:

Sherry Kelley Marshall, President/CEO SWORWIB
100 Scarlet Oaks Drive, Building 100, R
Sharonville, OH 45241
513-612-3643
smarshall@SWORWIB.org

Requisitioned Services for Request for Quotation:

The SWORWIB does not require a full time office coordinator and with the number of meetings and activities for the President and contractors, having a person dedicated to the office site has not proven effective. We are interested in individuals or firms with deep and broad administrative, clerical, and office experience that could be applied to our office operations on flexible hours and days when such services are most needed in coordination with the President's schedule and that of various contracted consultants and service providers. The SWORWIB requests identification of a single point of contact to manage services to the SWORWIB but is amenable to deployed service providers who may be best able to provide unique and essential services but not interested in more hours than these tasks would consume. We recognize that bidders may have multiple workers who could be involved in delivery of our services, but we expect a Single Point of Contact (SPOC) to manage communications and assignment of their staff rather than expect the SWORWIB team to understand and manage the contractor's communications and staffing assignments. In the event of an absence or departure of the SPOC, an alternative contact must be identified and trained to the SWORWIB's specific needs under this service contract.

The service being requisitioned in this Request for Quotations is a standard contract for services related to the administrative/clerical/filing and office needs similar to what any nonprofit organization could reasonably expect in daily operations, such as:

Prioritization and Team Work:

After some orientation and training, must have the ability to set priorities with limited information and understand the organizational impact of decisions, actions and changes. Must use a high level of discretion, confidentiality and judgment. Must use writing and editing skills for minutes and reports. Must communicate professionally and effectively with the President, project contractors and Board & Committee members.

Office Supplies and Equipment:

Handle ordering and maintaining office supplies, operating office equipment and upkeep for equipment with cartridge maintenance. Maintain small office and work areas in an organized fashion. Work with the President and facility management contractor to maintain the inventory record for office equipment and furnishings. Place orders through our selected vendors to maintain office supplies.

Information Systems:

Maintain the SWORWIB electronic and hard-copy filing systems, including monthly record keeping in detail of all Board and Committee meetings, minutes and sign in records as well as annual storage conversion to maintain records for the federally required time frames. Maintain records of all newsletter, public events and annual reports in collaboration with the Public Information Officer/Contractor. Work directly with the President on file setup and maintenance, both soft on the shared data drives or hard copy in the local and remote filing storage cabinets located at the OhioMeansJobs Center which is where most records three years or older are stored.

Coordination:

Support the President for contacts records, meeting preparations and calendar management of appointments. Establish and implement reporting systems. Work with the specialist contractors for scheduling group meetings and coordinating conflicts with office space or service support timing.

Project Efforts:

Based on successful administrative, clerical and office operations, be open to additional project efforts such as specific task management for maintaining customer complaints & resolutions; evaluating the Eligible Training Providers (ETPs) in collaboration with the President & ETP Committee; records maintenance and renegotiation for contracts and other agreements in order to highlight completion timeframes and begin next negotiations and other opportunities as they arise.

Required Technical Skills:

Cooperative, helpful and flexible. Microsoft Office knowledgeable and experience in Word, Excel, PowerPoint as well as Outlook through 0365 for email management. Must be able to work with Adobe PDF and disk storage systems. Notary public certified or willing to become one, which would be funded by the SWORWIB. Capable of learning new software and data management systems. Able to transport materials and equipment to meeting sites. Able to keep control of critical documents during meetings and return them for conversion to PDF and filing.

Other:

Open to other assignments as time and ability permits that may be unique to a single event or become ongoing as talent and experience provide the opportunity.

Proposal Format

Pre-Bid Conference: February 13, 2017, Noon, Room 102, Scarlet Oaks, Building 100

A pre-bid conference will be held for this process, as noted above. Sherry Kelley Marshall, President/CEO, will be available to review the bid and answer bidder questions.

Bid responses will be reviewed as received and considered at submission. All costs related to this request should be included in the quotation. Following the award of the contract and if mutually agreed to by both parties, this contract will be termed for a three year period and may then be extended for (3) additional one-year periods. The price will remain unchanged for the first two years of this contract. Pricing for year 3 should be submitted at time of this bid. In no instance shall the pricing of the extended years exceed 5% of the original quote.

The Proposal Format has been prepared to facilitate the submissions. Proposers are required to include the signed Quotation and Certification Form. The following Proposal Content Outline should be used and include all of the following:

- Signed Quotation and Signed Certification Form
- Qualifications of person(s) who will undertake the work identified in this quotation response.
- A short biography and resume will suffice.
- Identification of non-profit or small business experience.
- Plan of action for undertaking the work identified and proposal for starting time if selected.
- Two references with direct experience on related administrative services.
- Please provide a monthly fee schedule or hourly rate to simplify proposal analysis.

The quotation proposal must address all portions of the above and may be amended prior to the negotiated contract with a selected provider. SWORWIB reserves the right to request clarification or correction to proposals, to reject any and all proposals, or to cancel the RFP in its entirety at its sole discretion. Only the selected proposer will be contacted.