



The Southwest Ohio Region
WORKFORCE INVESTMENT BOARD

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

Bid Date: APRIL 27, 2020 – Updated-corrected deadline for after Memorial Day

Deadline for Receipt of Response: 4:00 p.m. MAY 26, 2020

The Southwest Ohio Region Workforce Investment Board invites you to submit a written proposal to provide Administrative and Office Services for a part-time basis, with periodic extended hours beyond part-time based on workload and with identification of work areas you are most interested in satisfying. This work will be by 1099 but could expand into a full-time position with benefits in the future as determined by the SWORWIB President & CEO for the “effective candidate bidder and based on his/her results and consistency”. Bidder can submit based on an hourly rate basis or by a monthly charge for which no taxes or withholdings will be covered by the SWORWIB. 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 19 year-old federal 501(c) 3 nonprofit entity operating 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 system. The SWORWIB board is comprised of 50-52 board members with 51% business representatives and the remaining public, nonprofit community and other partners. Over the many years there have been as many as twelve and as few as seven committees to be managed throughout the year with different meeting schedules. The SWORWIB office activities span the board and committee activities and reporting, grant applications and project activities, marketing, newsletters, podcasts, special projects, responding to multiple monitorings from state and federal and local units, as well as standards fiscal 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 that then subcontract through the Local Workforce Area (LWA). In the SWORWIB’s case, as Ohio Area #13, we serve the City of Cincinnati and Hamilton County. The SWORWIB is the provider of WIOA programs in this LWA.

The SWORWIB contracts for and oversees a One Stop Employment Center known as the OhioMeansJobs Center-Cincinnati/Hamilton County (A proud partner of the American Job Center network) and located at 1916 Central Parkway 45214. The OMJ

Center facility is three full floors, 45,000 square-feet with an adjacent two-story parking structure and other parking lot spaces behind the building. The SWORWIB has a lease with Hamilton County as part of a state-based Memorandum of Understanding (MOU) for multi-agency participation in facility costs. The SWORWIB negotiates and manages the entire facility in collaboration with the One Stop Operator for which we receive no funds for SWORWIB management in order to control costs to the partners and maintain a high participation rate by partners. The SWORWIB contracts for and pays all required services, repairs, improvements and public utility costs and both funds and manages contracting for any major repairs, such as rooftop heating and air unit replacement, elevator maintenance, and parking lots repairs. In partnership with several MOU partners, the SWORWIB also spent 50% of our own funds to totally remodel the lower level that the State of Ohio had never completed and actually left that floor in an “old computer graveyard and filthy mess.” Historically, the SWORWIB Executive has pursued other funding directly with local, state, national, private and foundation resources. The SWORWIB has also applied for Department of Labor grants as well as supported other partners’ applications for local, state, national and federal resources.

Administrative and Office Services:

The SWORWIB is comprised of a small team of specialist contractors to minimize public funds dedicated to administrative costs rather than direct service delivery to employers, jobseekers and youth both in-school and out-of-school. We have participated in gubernatorial initiatives in the State of Ohio such as the common marketing moniker of the 88 One Stop Centers into OhioMeansJobs Centers as well as assisted in the development of a nationally recognized robust website known as OhioMeansJobs.com. Additionally, the SWORWIB supported 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 24 hours or less 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 priority activities. These services, as well as all other contracted contributors, are therefore expected to keep the SWORWIB highly functional, technically updated in soft and hard copy files and well-planned for all efforts.

Lastly, the SWORWIB has separately contracted for production of our Annual Report and our NewsWIB Monthly Newsletter. However, our time demands were challenging for those contractors focused only on the Newsletter resulting in unmanageable time frames to meet the last day of the month NewsWIB release. Consequently we also ask for your familiarity with Constant Contact as a newsletter framework and your skills at loading and adjusting NewsWIB content to meet the President’s time and quality requirements.

REQUEST FOR QUALIFICATIONS AND QUOTATION

Please quote on the following services and mail, email or deliver your hard copy response as soon as possible and no later than 4:00 p.m. MAY 26, 2020 to:

**Sherry Kelley Marshall, President/CEO SWORWIB 100 Scarlet Oaks Drive,
Building 100, Room 102 Sharonville, OH 45241 513-612-3643
smarshall@SWORWIB.org.**

Given the COVID 19 Era in which we are advertising for services, please call the phone number, 513-608-6061 and determine a specific time when you can drop off One (1) Original and Two (2) Copies of your submittal response so the SWORWIB team can assure your ability to meet the deadline for the Requisitioned Services through this RFQ/RFP Request for Quotation

Requisitioned Services for Request for Qualifications and 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 full-time 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 as well as the calendar of activities, events and meetings. 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 services 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. We also welcome individuals with great administrative and clerical skills who want part-time, flexible work and have strong experience maintaining administrative and office operations, including inventory, consumable supplies, printers/other equipment, committee minutes drafting, committee attendance recordkeeping, word and excel reports, PowerPoint presentation and spreadsheets that summarize efforts and progress. 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 below.

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, letters and reports. Must be well organized and able to manage a variety of important tasks simultaneously and to completion. Must communicate professionally and effectively with the President, project contractors and Board & Committee members as well as other staff who serve our other contractors: OMJ Center, Youth Providers, Grant Coordinators, Apprenticeship Reporting, 1916 service entities for building management, etc.

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 and Use of Technology:

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 SWORWIB President, marketing specific contractors or others involved in this work. Work directly with the President on file setup and maintenance, both soft on the shared data drives and/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.

Relative to Technology, the SWORWIB uses Constant Contact for our NewsWIB Newsletter and other media notification. Competence in this technology and/or ability to learn and expand is essential. Similarly, due to the impact of COVID, the SWORWIB will be hosting, as needed in this pandemic, virtual meetings for which the office/administrative contractor is essential to arrange and maintain through the appropriate services – WebEx and Microsoft Teams for now. This contractor is also responsible for drawing down state released policies for the President to interpret and summarize for the Board Members. Given the hours and load of the President, this contractor is also responsible for working with the President on calendar management and priority setting for project/program/documentation completion and release.

Coordination:

Support the President for contact records, meeting preparations and calendar management of appointments. Establish and implement reporting systems. Work with the specialist contractors for scheduling group meetings and coordinating 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:

Be cooperative, helpful and flexible. Microsoft Office knowledgeable and experienced in Word, Excel, PowerPoint, Microsoft Teams, as well as Outlook, Adobe PDF and disk storage systems. 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 while also communicating effectively on status of completion. Motivated for productivity and performance excellence. Self-starter who doesn't need ongoing work-based social exchange, daily supervision or frequent social interaction in the course of work product activity.

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. Avoid unnecessary chatty exchanges and gossip about the SWORWIB team, executive and board members as well as our contractors and partners.

Proposal Format

Bid responses will be reviewed as received and considered at submission. All anticipated costs related to this request should be included in the quotation but costs of responding to the bid are not considered for reimbursement. Following the award of the contract and if mutually agreed to by both parties, this contract will be termed for a two year period and may then be extended for (2) additional one-year periods. The price will remain unchanged for the first two years of this contract. Pricing for year 3 and 4 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. A short biography and complete resume will suffice.
- Identification of non-profit or small business experience.
- Plan of action for undertaking the work you are most interested in and proposal for monthly hours and preferred hours 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 the selected provider. SWORWIB reserves the right to request clarification or correction to proposals as well as to reject any and all proposal submissions, or to cancel the Request for Proposals (RFP) in its entirety at our sole discretion. ***Only the selected proposer will be contacted.***

If the RFP is cancelled in its entirety, we will rebid the RFP and if we have your email address will notify you of the rebidding by email.

REQUEST FOR PROPOSALS AS TO QUALIFICATIONS AND QUOTATIONS FOR ADMINISTRATIVE AND OFFICE SERVICES

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 this page as well as the certification on this page must be completed and signed as the front page of your proposal submission.

I/WE QUOTE YOU AS INDICATED ON THIS ATTACHED RFP/RFQ

Individual Contractor or Firm Name: _____

Signature: _____

Title: _____

Quotation Amount: Year 1: _____ 2 _____ 3 _____ 4 _____ 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, attach an explanation to your bid/quotation and proposal.

Signature: _____

Date: _____

Printed Name and Title: _____