

**Logistical Support and Coordination Services to the Pennsylvania Rehabilitation Council**  
**Invitation for Bid**  
**Statement of Work**

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**Project Name:** Logistical Support and Coordination Services to the Pennsylvania Rehabilitation Council

**Department:** Department of Labor & Industry, Office of Vocational Rehabilitation

**Date:** December 14, 2017

**I. BACKGROUND**

The Department of Labor & Industry, Office of Vocational Rehabilitation (“OVR”), allocates funds each year to obtain logistical support and coordination services to the Pennsylvania Rehabilitation Council (“PaRC”). Pursuant to Commonwealth of Pennsylvania (“Commonwealth”) procurement requirements, and the Federal Rehabilitation Act of 1973, *as amended*, these services are to be competitively procured. These services have enhanced the operation of the PaRC and have led to the following accomplishments: position papers developed by the PaRC have been considered and incorporated into legislation, policies, and programs which have benefited persons with significant disabilities in their vocational pursuits; the PaRC has met all its categorical membership requirements of the Rehabilitation Act; the PaRC membership reflects ethnic, gender and geographic diversity; and the PaRC members have a greater understanding of their responsibilities as defined in federal law and use this knowledge in defining PaRC positions and advising OVR.

**II. DELIVERABLES**

The awarded contractor (“Contractor”) will complete the following deliverables during each year of the Contract:

- A. Contractor will arrange, coordinate, facilitate, and produce minutes for a minimum of four quarterly meetings of the PaRC during a federal fiscal year. Tasks include:
1. arranging for public notice of meetings, site selection, audiovisual needs and material distribution;
  2. arranging for accommodation and lodging needs for individual PaRC members, facilitators and speakers for each meeting;
  3. arranging for interpreters, Communication Access Realtime Translation (“CART”) services and other reasonable accommodations for each meeting;
  4. meeting/corresponding with PaRC leadership and OVR personnel to be briefed on upcoming meeting, support materials production and particular staff support needs;
  5. recording all meetings, developing minutes and distributing finished minutes, including alternative formats;
  6. follow up and research agreed upon for action items in agreed upon time frames;
  7. updating contracts with facilities, interpreters, real time captionists and others on a yearly basis for quarterly meetings; and
  8. completing bid process for subcontractors as needed for the quarterly meetings.

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- B. Contractor will arrange, coordinate, facilitate, and produce minutes for PaRC committee meetings. Committee meetings will be conducted via conference calls. Currently, there are five committees (Legislative, State Plan, Customer Satisfaction, Disability Agenda, and CareerLink Accessibility) in addition to the Executive committee, which is comprised of the officers and chairs of the committees. Contractor is also responsible for support to ad-hoc committees, as needed. Tasks include:
1. scheduling conference calls;
  2. arranging for interpreters for those requiring accommodation;
  3. arranging and coordinating for guests and consultants to participate in calls as requested;
  4. recording the conference call minutes and distributing finished minutes, including in alternative formats; and
  5. follow up and research for action items in agreed upon time frames.
- C. Contractor will assist PaRC with review of information, solicit input, and provide feedback related to OVR policy, procedures, etc., as is appropriate to PaRC's advisory role to OVR. Tasks include:
1. coordinating information needs between OVR, PaRC, and others;
  2. assisting in planning of activities as directed by PaRC/OVR;
  3. identifying resource people for specific PaRC needs, i.e. educational speakers/trainers/facilitators;
  4. researching specific questions pertinent to PaRC activities/OVR policies;
  5. maintaining and upgrading PaRC website;
  6. maintaining a manual of OVR's numbered memorandums for reference;
  7. assisting in developing and managing PaRC's Resource Plan/operating budget;
  8. researching potential PaRC members for submission to nominating process; and
  9. assisting in staff evaluation process.
- D. Contractor will assist PaRC with preparation and dissemination of information, solicit input, and comply with reporting requirements as may be imposed upon it by the federal government and/or the Commonwealth and/or OVR. Tasks include:
1. compiling and writing PaRC's annual report, managing report approval process through PaRC and OVR and arranging printing and distribution of report, including in alternative formats;
  2. assisting the PaRC in the preparation of position papers and statements;
  3. assisting the PaRC in the preparation of reports, updates, etc., to be used by council members at presentations, board meetings, forums, etc. to disseminate information on the PaRC;
  4. producing monthly, quarterly and end of federal fiscal year fiscal/program reports and requests for funds; and
  5. assisting with Customer Satisfaction Survey, the State Plan attachment and needs assessment, as required.
- E. Contractor will coordinate and arrange logistics associated with any PaRC function sanctioned by the Commonwealth, including scheduling of events, lodging arrangements, related travel

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arrangements, maintenance of travel records, travel reimbursement and reasonable disability-related accommodations for PaRC members or others approved by the Commonwealth. Tasks include:

1. assisting in planning and coordinating of PaRC and OVR Annual Planning Retreat and other functions as requested such as strategic planning; and
  2. assisting members in travel and lodging arrangements, including disability-related accommodations, for retreat and other functions, and in the completion of reimbursement forms.
- F. Within the Statement of Work, Contractor must provide a realistic estimate of the time required for start-up activities prior to initiating Project services.
- G. Contractor must present a budget, three months prior to the start of each federal budget period, that achieves the deliverables identified in the Statement of Work/Work plan.
- H. Contractor must present a program evaluation plan with a quantifiable approach to measure progress toward project deliverables, including a timeline, start dates, tasks, responsible parties, and a plan to regularly measure customer satisfaction.
- I. Contractor must participate in OVR program evaluation, grant monitoring, audit, and other program-related activities that apply during the term of the resulting contract.
- J. Contractor must submit to OVR a Quarterly Narrative and Financial Statement Report (Attachment C), based on the federal budget period, within 15 calendar days after the close of each federal budget quarter. Statistical reports must be attached to the Quarterly Narrative and Financial Statement Report to support the progress made toward program deliverables.
- K. Contractor must complete Staff Certification Forms (Attachment B) monthly for all contract-supported staff to reflect contract-related activities and hours spent performing contract activities. Staff Certification Forms for each month of the preceding state fiscal quarter must be attached to the Quarterly Narrative and Financial Statement Report. Original wet signatures are required on Staff Certification Forms. This requirement is the standard operating procedure. Original documentation is being requested for the period submitted. OVR staff will review and verify original documents and then return the original documents to the Contractor.
- L. Contractor must complete both a Quarterly Narrative and Financial Statement Report and a final report at the end of each federal fiscal year. The final report will include an updated cumulative statistical and narrative report supporting Contractor's progress toward stated deliverables for the entire federal fiscal year, as well as final contract-related fiscal expenditures. Final federal fiscal year reports are to be submitted to OVR within 60 calendar days after the close of the federal fiscal year.

### **III. ELIGIBILITY REQUIREMENTS**

Eligible bidders are existing public or private entities (not-for-profit or for profit) that possess the ability to provide the required "Deliverables" and have at least five years of demonstrated experience and expertise in

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effectively managing the budget and operations for, and facilitating the activities of, advisory boards and/or other advisory bodies.

**IV. PERIOD OF THE CONTRACT**

The period of the contract is for nine months, with options to renew for four additional one year periods, based on available funding and satisfactory completion of the required deliverables. The contract is anticipated to be effective January 1, 2018. In the event that all signatures required for execution of the Funds Commitment are not obtained prior to January 1, 2018, the contract will be effective as of the date of the last signature required for execution. The contract will terminate on September 30, 2018, but may be renewed and extended by mutual agreement of the parties in writing, subject to availability of funds.

**V. IMPLEMENTATION**

- A. Contractor will meet with OVR staff, as required by OVR for program oversight.
- B. Contractor will provide Quarterly Narrative and Financial Statement Reports as required.
- C. Contractor will submit a Request for Funds (“RFF”) Form (Attachment A) monthly to draw down funds to operate the program.

**VI. REPORTS AND PROJECT CONTROLS**

- A. Contractor will provide to OVR the completed Quarterly Narrative and Financial Statement Report (see Attachment C) and Staff Certification Forms at the end of each federal fiscal quarter.
- B. Contractor must submit itemized receipts for all purchases of \$250.00 or more with the RFF Form (see Attachment A). OVR reserves the right to adjust this threshold.
- C. Contractors will submit a final report at the end of each federal budget period. The format for this report will be provided by OVR.

**VII. CONTRACT REQUIREMENTS**

The following documents are made a part of and incorporated into this Invitation for Bid (“IFB”): Attachment A – (Sample) RFF Form; Attachment B – (Sample) Staff Certification Form; Attachment C – Quarterly Narrative and Financial Statement Report; Attachment D – Standard Contract Terms and Conditions (BOP-1204); Attachment E – Travel Reimbursement Guidelines; Attachment F – Lobbying Certification and Disclosure Form; Attachment G – Domestic Workforce Certification Form, and Attachment H – OVR IFB Terms and Conditions.

**VIII. METHOD OF AWARD: IFB MULTIPLE AWARD; REQUEST FOR QUOTE, BEST VALUE DETERMINATION**

To be eligible for selection, a bid must be submitted on time and be properly signed by the bidder. All responsive and responsible bidders who comply with the “Eligibility Requirements” set forth in this IFB

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will be issued a contract. The Request For Quote process includes these four steps:

- A. When services are needed to provide logistical support and coordination to the PaRC, OVR will issue a written Request for Quote (“RFQ”) via email to contractors on the list of responsive and responsible bidders.
- B. The RFQ will include detailed quote instructions.
- C. After the RFQ is issued and quotes are received, OVR will select the contractor based upon a Best Value Determination.
- D. OVR may issue a funds commitment to the selected contractor based upon the Best Value Determination. OVR reserves the right to award a funds commitment for logistical support and coordination services to the PaRC based on available funding after the Best Value Determination has been completed.

**IX. ALLOWABLE AND UNALLOWABLE COSTS**

Costs must be directly related to the provision of logistical support and coordination services. Bidders are strongly encouraged to build upon existing resources, including the use of existing facilities and equipment to support the project.

A. Allowable costs:

- 1. unspecified administrative overhead costs are limited to no more than 5% of total budget (exclusive of PaRC budget costs);
- 2. personnel and fringe benefits;
- 3. staff travel;
- 4. project supplies; and
- 5. other costs allowable through applicable federal regulation and required for the operation of the project will be considered.

B. Disallowable Costs:

- 1. building construction, including the purchase of a building;
- 2. renovations or alterations;
- 3. indirect costs which are costs that have been incurred for common or joint objectives and cannot be readily identified with a particular final cost objective;
- 4. vehicles;
- 5. OVR customer wages or stipends;
- 6. entertainment expenses, including refreshments for any type of celebration or meeting;
- 7. finance charges, fines or interest charges;
- 8. projects or programs supported during the fiscal year with other state or federal funds;
- 9. any costs associated with the development of this bid; and
- 10. other costs disallowed by the Rehabilitation Services Administration.

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**X. OPTION TO ADD/REMOVE SERVICES**

The addition and/or deletion of any service during the life of this contract will be at the sole discretion of OVR, if it is deemed to be in the best interest of the Commonwealth. Existing services may be removed from the contract for reasons including if services are no longer required or OVR determines that the removal of a service is in the best interest of the Commonwealth.

**XI. BID SUBMISSION**

Bidders must complete and submit by mail the following documents in response to this IFB:

- A. the bid form;
- B. Attachment F (Lobbying Certification and Disclosure Form);
- C. Attachment G (Domestic Workforce Utilization Certification Form); and
- D. narrative and information required to determine eligibility as described in Section III, "Eligibility Requirements".

Sealed bids should be forwarded to:

Lori Micheals  
Department of Labor and Industry  
BAS Procurement, Room 205  
651 Boas Street  
Harrisburg, PA 17121

Notate on envelope: Bid enclosed, deliver unopened to Lori Micheals

**XII. BILLING AND REPORTING REQUIREMENTS**

Contractor shall submit the RFF form (see Attachment A) to OVR each month for services provided under this contract. The RFF form must include a breakdown of charges and a detailed report of the services provided. The RFF form must be sent to OVR and include copies of all receipts for purchases of \$250.00 or more to document project services and expenditures. All purchases under \$250.00 must be listed separately. OVR reserves the right to request copies of any receipts for said purchases prior to approving payment. For financial accountability purposes, Contractor will be required to maintain records for auditing purposes that are sufficient to fully disclose the nature and extent of all services provided during the length of the contract for five years after the expiration of the contract. The Quarterly Narrative and Financial Statement Reports and the Staff Certification Forms are submitted quarterly.

**XIII. SENSITIVE INFORMATION**

Contractor shall adhere to the confidentiality requirements of the Federal Rehabilitation Act of 1973, *as amended*, and its governing regulations.

**XIV. DOMESTIC WORKFORCE UTILIZATION CERTIFICATION**

To the extent that any services could be performed outside of the geographical boundaries of the United States, the bidder will be required to certify that those services will be performed exclusively within the geographical boundaries of the United States or specify the percentage of the direct labor that will be performed outside of the United States. The certification form is included with the IFB and must be completed by the bidder. OVR will use the certification in making a best value determination.