

Data Analysis

Request for Proposal (“RFP”) #08-21

Pre-Proposal Conference

May 22, 2023

- Natalie Bates – DHS Office of Children, Youth and Families, Chief of Staff
- Elysa Springer, DHS Office of Children, Youth and Families, Systems and Data Management Unit, Director
- Holly Zeiders – DHS Bureau of Procurement and Contract Management, Issuing Officer
- Kheea Anderson – DGS Bureau of Diversity, Inclusion and Small Business Opportunities
- Laura Schlaginhauf – DHS Bureau of Employment Programs, Contractor Partnership Program

Agenda



- Introductions
- Ground Rules
- Critical Points
- Project Overview
- Technical Submittal Overview
- Small Diverse Business/Veteran Business Enterprise Overview and Requirements
- Contractor Partnership Program Overview and Requirements
- Timeline
- Adjourn

- All questions must be submitted via the Q&A Board within JAGGAER by June 5, 2023 at 12:00:00 PM EST.
- Answers to Potential Offeror questions will be posted on the DGS website (<http://www.emarketplace.state.pa.us/>) and JAGGAER by June 16, 2023.
- Any changes to the RFP will be issued as a formal written addendum in accordance with Section #11 of the RFP Description.
- All communication concerning this RFP shall be made through the Issuing Officer.

Mandatory Responsiveness Requirements (**Section 32**)

To be eligible for selection, a proposal must:

- Be timely received from an Offeror (see **Section 12**);
- Be properly signed by the Offeror (see **Section 14.A** above);
- Contain an SDB Participation Submittal and additional required documentation; and
- Contain an VBE Participation Submittal and additional required documentation.

Technical Noncomforming Proposals. (**Section 33**)

The four Mandatory Responsiveness Requirements set forth in Section 32 above (A-D) are the only RFP Requirements that the Commonwealth will consider to be *non-waivable*. The Department may, in its sole discretion, (1) waive any other technical or immaterial nonconformities in an Offeror's proposal, (2) allow the Offeror to cure the nonconformity, or (3) consider the nonconformity in the scoring of the Offeror's proposal.

- To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFP carefully and submit a complete proposal, including the required signature. Follow the proposal format as detailed in RFP Description Section #15.B. Include the appropriate heading descriptions, respond to all requirements and provide any other relevant information as an appendix.
- The Department may request an oral or written presentation or both from Offerors.
- Each proposal must have five separate submittals; Technical, Cost, Small Diverse Business Participation, Veteran Business Enterprise Participation, and Contractor Partnership Program.
 - The references completing the Corporate and Key Personnel Reference Questionnaires must submit the completed forms electronically to RA-PWBPCMReferForms@pa.gov.

Critical Points - Continued



- Do not include any cost data, including costs data for the Small Diverse Business and Veteran Business Enterprise submittals in the Technical portion of your proposal.
- Proposals (the electronic copy in JAGGAER) and the electronic copies of the completed Corporate and Key Personnel Reference Questionnaires must be received by 12:00:00 pm on July 6, 2023.
- The resulting contract will be for a term of three years with one additional two-year renewal option.

- The RFP will be evaluated based on the following criteria:
 - Technical – 65% (The raw score of the Offeror's Technical Submittal must be greater than or equal to 75% of the available raw technical points)
 - Cost – 35%

To be considered a responsible Offeror, the raw score of the Offeror's Technical Submittal must be greater than or equal to 75% of the available raw technical points.

- The technical evaluation will be based upon the following criteria:
 - Soundness of Approach;
 - Understanding the Project;
 - Offeror(s) Qualifications; and
 - Personnel Qualifications.

Project Overview



- The Department and the Office of Children Youth and Families (“OCYF”) is seeking an experienced Offeror to provide data gathering, data analysis, and production of required reports for OCYF, as well as the provision of technical assistance and training on the gathering, analysis, and use of quality data for OCYF and Pennsylvania’s 67 County Children and Youth Agencies (“CCYAs”).
- Data gathering, analysis and generation of reports will assist OCYF in complying with Federal and state reporting requirements outlined under Title IV-B and Title IV-E of the Social Security Act and the Child Abuse Prevention Treatment Act, as well as state statute.
- Provision of technical assistance and training on the gathering, analysis, and use of quality data for OCYF and Pennsylvania’s 67 CCYAs may be related to continuous quality improvement efforts within the county or OCYF or helping counties and OCYF staff in better reporting of data needed for state and federal reports.
- Offeror will also assist OCYF in responding to internal and external requests for agency data.
- Offeror will identify and evaluate findings of programmatic strengths and weaknesses through the analysis of OCYF and CCYA data; and provide recommendations for further analysis to assist OCYF in evaluating the effectiveness of programs and services.

- Pennsylvania's child welfare system is state supervised, through OCYF, and county administered through the 67 CCYAs. This project will involve the entire geographical state of Pennsylvania, including all of the associated CCYA offices subject to licensing and oversight by OCYF.
- OCYF's current data collection and reporting is performed using a combination of legacy and modern information technology ("IT") systems, and Microsoft tools and templates. OCYF is in the process of implementing a statewide Child Welfare Case Management ("CW CM") System, which will consolidate the majority of child welfare data into one comprehensive system.
- This project will support OCYF as it transitions from data collection and data maintenance across various legacy systems towards use of a single, statewide CW CM System.

Project Overview (cont.)



- Offerors must respond to all areas of the technical submittal and propose how the Offeror will satisfy each of the following Requirements. Please reference the RFP for more information.
 - Health Insurance Portability and Accountability Act Regulations
 - Federal and State Requirements
 - Conflict of Interest Requirements
 - Staff Training
 - Document Security
 - Disaster Recovery
 - Emergency Preparedness
 - Customer Service Transformation
 - Lobbying Certification and Disclosure of Lobbying Activities
 - Worker Protection and Investment
 - Cloud Computing, VPAT, and SOC Reports

This is a broad list of requirements. Please pay close attention to the details describing each in Part I of the RFP.

Project Overview (cont.)



- Offerors must respond to all areas of the technical submittal and propose how the Offeror will satisfy each of the following Tasks. Please reference the RFP for more information.
 - Knowledge Transfer and Transition
 - Turnover
 - Federal Reporting Tasks
 - Covers federally required data reporting requirements
 - State Reporting Tasks
 - Covers required data reporting requirements under state statute and data needed to support major stat directed initiatives
 - Training
 - Ad-Hoc Data Analysis
 - Covers additional analysis not specifically identified within federal and state reporting tasks but which may be needed by OCYF or counties for specific projects, initiatives or public inquires as they arise.

This is a broad list of tasks. Please pay close attention to the details describing each in Part I of the RFP.

Goal Setting Information Session

RFP 08-21-Data Analysis

Issuing Officer –
Holly Zeiders-
hzeiders@pa.gov

June 1, 2023 2:00 PM

Offerors may ask questions during the Session, however responses provided during the Session are not official until the question is submitted in writing to the Issuing Officer.



What's the Point?



Diversity, Equity, and Inclusion
RE- IMAGINING THE CULTURE OF YOUR WORKPLACE



Diversity Defined

- Diversity is...
 - everything that makes us unique,
 - our cognitive skills and personality traits, and
 - also the things that shape our identity (*e.g. race, age, gender, religion, sexual orientation, cultural background*), etc.



Diversity is the Mix Inclusion is making the mix work. ~Andres Tapia

Baking a cake

Each ingredient has its own *distinct* taste and quality...



Baking a cake

Each ingredient adds *value* to the recipe...



Baking a cake

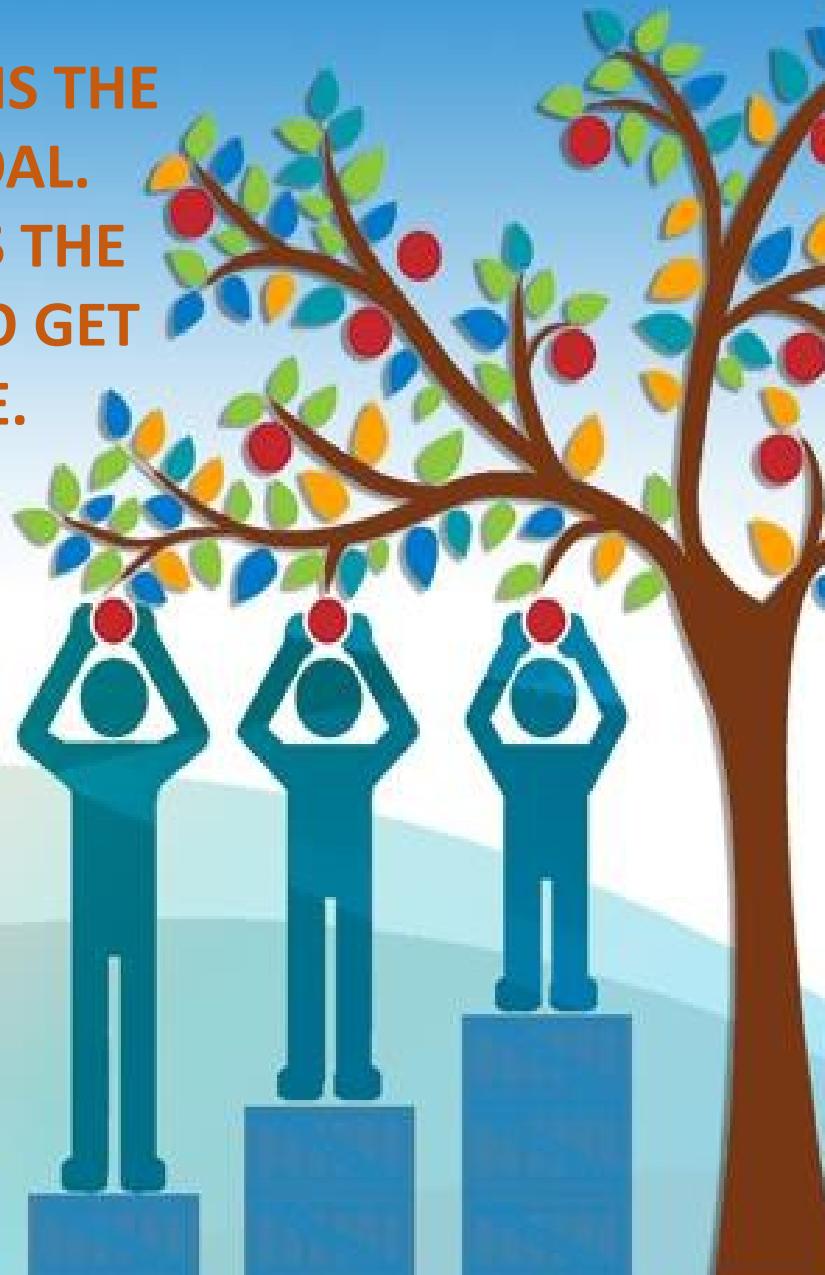
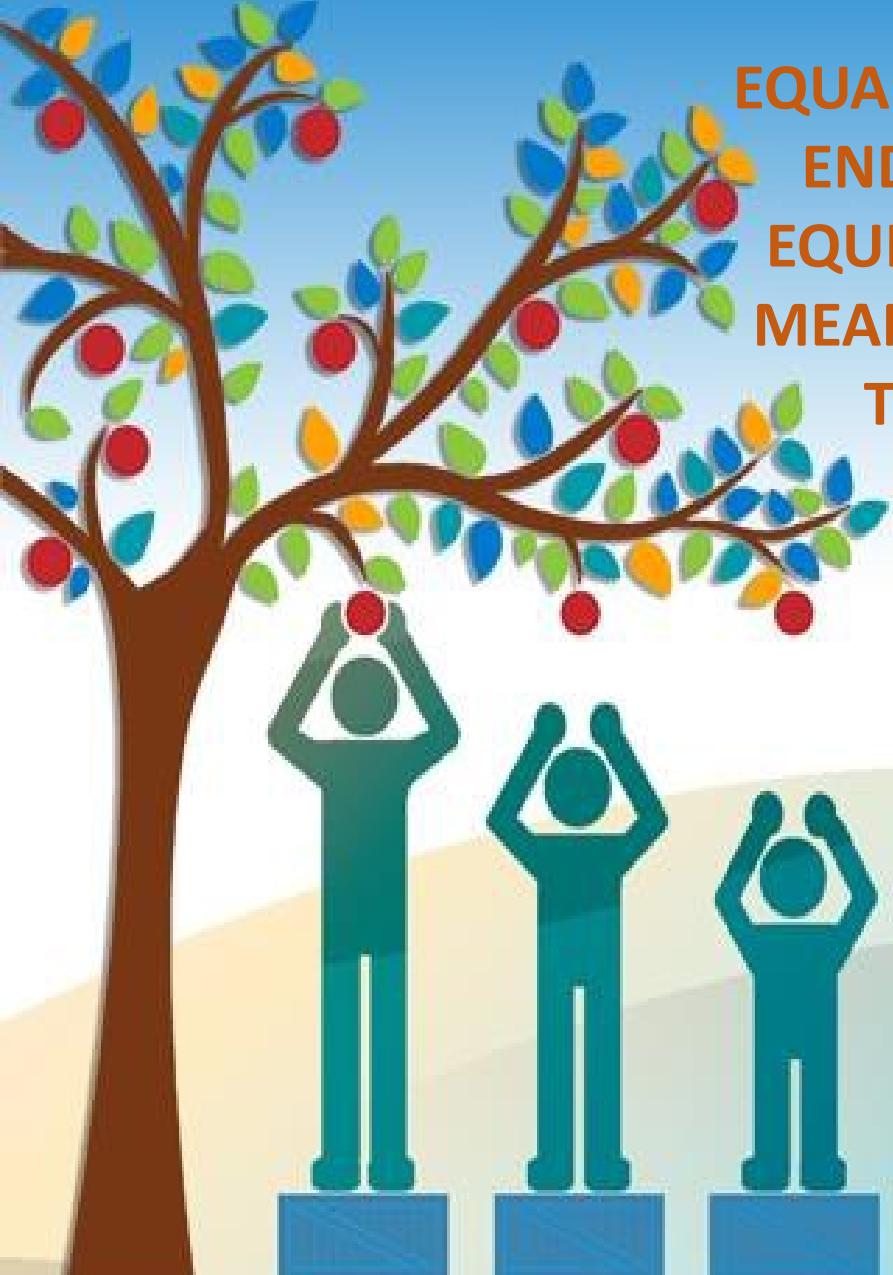
Recognizing the individuality and the value of *every* person is essential to understanding the concept of diversity.



Equity Defined

Equity is the fair treatment, **access**, **opportunity**, and advancement for **all** people, while at the same time striving to identify and **eliminate barriers** that have prevented the full participation of *small businesses*.





**EQUALITY IS THE
END GOAL.
EQUITY IS THE
MEANS TO GET
THERE.**

Equality

Equity

Inclusion Defined

Inclusion is about:

- *Small Businesses* as prime contractors
- *Primes* subcontracting with SB,SDB,VBE vendors
- Engaging with vendors representative of the community



Diversity, Equity, and Inclusion

Diversity

Having a seat
at the table

Equity

Entering the
conversation
without
barriers

Inclusion

Being heard
and having a
voice at the
table



Small Diverse Business Enterprise (SDB) and Veteran Business Enterprise (VBE) References:

General Information

- #13 - Small Diverse Business ("SDB") and Veteran Business Enterprise ("VBE") Participation.
- #14.B.2 and 3- Proposal Requirements

Criteria for Selection

- #32.C and D - Mandatory Responsive Requirements
- #34. - Evaluated for compliance, not scored

Small Diverse Business Participation & Veteran Business Enterprise Participation Submittal Information

- JAGGAER RFP Questions Group 1.2 – Small Diverse Business Participation
- JAGGAER RFP Questions Group 1.3 – Veteran Business Enterprise Participation

A Bidder/Offeror's failure to meet the SDB participation goal in full and the VBE participation goal in full, or their failure to receive an approved Good Faith Efforts waiver for any unmet portion of either the SDB or VBE participation goal will result in the rejection of the Bid or Proposal as nonresponsive



Solicitation Specific Goals



RFP 08-21 Data Analysis	SDB	VBE
	9%	3%

- Available subcontracting opportunities across the entire state for the applicable services,
- Availability of DGS-verified SDB/VBEs to perform commercially useful functions, and
- Historical analysis of similar projects within the last 3 years.

Primes are welcome to exceed the goal!



SDB and VBE Classification

Vendors must self-certify as a Small Business (SB) prior to SDB/VBE validation.

SB Eligibility Requirements

- The business must be a for-profit, United States business.
- The business must be independently owned.
- The business may not be dominant in its field of operation.
- The business may not employ more than 100 full-time equivalent employees.
- The business may not exceed three-year average gross revenues of \$38.5 Million, regardless of business type (effective 11/1/2018).

Small Diverse Business (SDB)

Goal oriented

- Woman Business Enterprise (WBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)
- Minority Business Enterprise (MBE)
- LGBT Business Enterprise (LGBTBE)
- Disability-Owned Business Enterprise (DOBE)

Veteran Business Enterprise (VBE)

Goal oriented

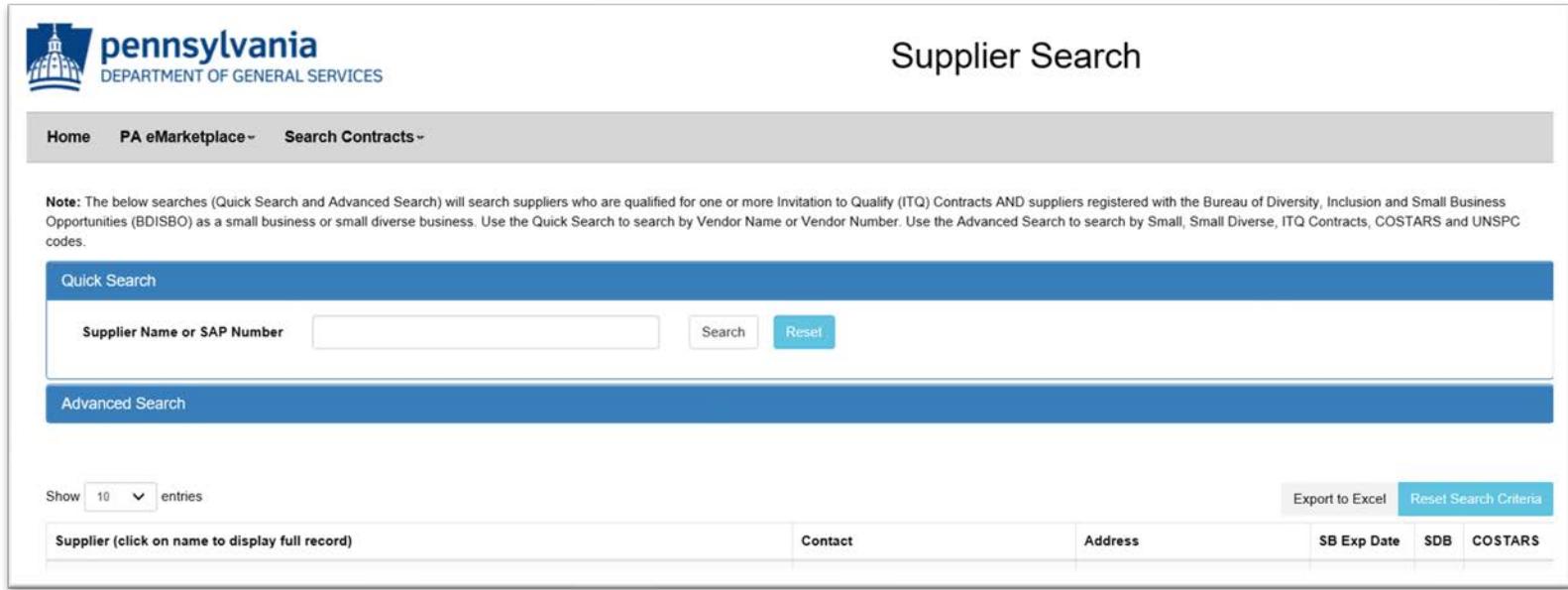
- Veteran Business Enterprise (VBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)

SDBs and VBEs must be certified/valid as of bid close due date and time.



Finding SDBs and VBEs

Utilization Compliance will be closely monitored and enforced



The screenshot shows the 'Supplier Search' page of the Pennsylvania Department of General Services. The page features a logo for the Commonwealth of Pennsylvania and the text 'pennsylvania DEPARTMENT OF GENERAL SERVICES'. A navigation bar includes links for 'Home', 'PA eMarketplace', and 'Search Contracts'. A note at the top explains that the search will find suppliers qualified for ITQ Contracts and registered with BDISBO. Below this are two search sections: 'Quick Search' (with a 'Supplier Name or SAP Number' input field, 'Search' button, and 'Reset' button) and 'Advanced Search'. At the bottom, there are buttons for 'Show 10 entries', 'Export to Excel', and 'Reset Search Criteria'. A table displays search results with columns for 'Supplier', 'Contact', 'Address', 'SB Exp Date', 'SDB', and 'COSTARS'.

<http://www.dgs.internet.state.pa.us/suppliersearch>



Finding SDB/VBE vendors

- <http://www.dgs.internet.state.pa.us/suppliersearch>
- Access Search Guide -
<https://www.dgs.pa.gov/Small%20Diverse%20Business%20Program/Documents/Finding%20SBs%20and%20SDBs.pdf>
- Supplier Search assistance available from Issuing Officer or Bureau of Diversity Procurement Liaison



Quick Search

 **pennsylvania**
DEPARTMENT OF GENERAL SERVICES

Supplier Search

Home PA eMarketplace Search Contracts

Note: The below searches (Quick Search and Advanced Search) will search suppliers who are qualified for one or more Invitation to Qualify (ITQ) Contracts AND suppliers registered with the Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO) as a small business or small diverse business. Use the Quick Search to search by Vendor Name or Vendor Number. Use the Advanced Search to search by Small, Small Diverse, ITQ Contracts, COSTARS and UNSPC codes.

Quick Search

Supplier Name or SAP Number Search Reset

Advanced Search

Show 10 entries Export to Excel Reset Search Criteria

Supplier (click on name to display full record)	Contact	Address	SB Validity Dates	SDB Validity Dates	VBE Validity Dates	COSTARS
21ST CENTURY MEDIA NEWSPAPER LLC	ROBERT BUTKINS sales@nittanyvalley.com					No
22 GROUP, LLC ()	Caroline M. Harper	757 PUBLIC RD	9/23/2019-	9/23/2019-		No

IMPORTANT: Always click Reset prior to a new search to clear parameters from previous searches

To search or browse ALL Small and Small Diverse Businesses by Name OR 6-digit SAP Number (option also available through Advanced Search)



Advanced Search

Hierarchy	Category Number
Segment	44000000
Family	44120000
Class	44121700
Commodity	44121706

Supplier Classifications

- Minority Business Enterprise
- Woman Business Enterprise
- LGBT Business Enterprise
- Disabled-Owned Business Enterprise
- Service-Disabled Veteran Business Enterprise
- Veteran Business Enterprise
- Small Business
- Stocking Supplier
- Non-Stocking Supplier
- Select all Classifications
- Select all Small Diverse Business Classifications

UNSPSC Description

Enter a brief code description (e.g. Door)

When searching by UNSPSC code, only enter the first 6 digits (UNSPSC Class Level) as the last 2 digits (Commodity Level) are not tracked in this database. Or, type in any part of a UNSPSC code description to find vendors who have a code that matches. ex: Searching for "landscaping" will find vendors who have selected any code that has "landscaping" anywhere in the description.
For more information visit [UNSPSC > Home](#)

UNSPSC Code

Click arrow to expand Segment for additional codes

- 10000000 - Live Plant and Animal Material and Accessories and Supplies
- 11000000 - Mineral and Textile and Inedible Plant and Animal Materials
- 12000000 - Chemicals including Bio Chemicals and Gas Materials
- 13000000 - Resin and Rosin and Rubber and Foam and Film and Elastomeric Materials
- 14000000 - Paper Materials and Products
- 15000000 - Fuels and Fuel Additives and Lubricants and Anti corrosive Materials
- 20000000 - Mining and Well Drilling Machinery and Accessories
- 21000000 - Farming and Fishing and Forestry and Wildlife Machinery and Accessories
- 22000000 - Building and Construction Machinery and Accessories
- 23000000 - Industrial Manufacturing and Processing Machinery and Accessories
- 24000000 - Material Handling and Conditioning and Storage Machinery and their Accessories and Components
- 25000000 - Commercial and Military and Private Vehicles and their Accessories and Components

Find only vendors that have all selected UNSPSC codes
 Find only vendors that have at least one selected UNSPSC code

Select one or more classifications. To pull only SDBs, check "Select all Small Diverse Business Classifications" below. To Include SBs, check "Small Business".

OR

Browse and select one or more codes. Don't know the codes you want? Search for codes at www.UNSPSC.org.



UNSPSC Commodity Code Search



Find A Partner

Menu

UNv24.0301 of the UNSPSC Codeset is now available. [Access codesets.](#)

Search the Code

Version 24.0301
Code Number: (2-8 digits)

Code Name:

Welcome

The **United Nations Standard Products and Services Code® (UNSPSC®)**, managed by GS1 US® for the UN Development Programme (UNDP), is an open, global, multi-sector standard for efficient, accurate classification of products and services.

The UNSPSC offers a single global classification system that can be used for:

- Company-wide visibility of spend analysis
- Cost-effective procurement optimization
- Full exploitation of electronic commerce capabilities



UNSPSC Commodity Code Search

Write down
your code
selections



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Version 24.0301

Search Code

Search Title

painting

Code	Title
31211900	Paint applicators and painting accessories
60121001	Paintings
60121225	Watercolor painting mediums
60124101	Multicultural painting products
72151300	Painting and paper hanging services
72151301	Residential painting service
72151302	Commercial painting service
72151303	Industrial painting service
72151304	Aircraft painting service
72151305	Bridge painting service
72151307	Ship painting service
73181104	Painting services
78181501	Vehicle body repair or painting service
78181836	Aircraft fixed wing coating and painting service
86131502	Painting



Advanced Search

Use multiple filters to restrict your search results to exactly what and where you need.

PA Counties

- Clinton County
- Clearfield County
- Columbia County
- Crawford County
- Cumberland County
- Dauphin County
- Delaware County
- Elk County
- Erie County
- Select all Counties

Find only vendors that s

Find only vendors that s

Supplier Classifications

- Minority Business Ent
- Woman Business Ent
- LGBT Business Ent
- Disabled-Owned Bu
- Service-Disabled Ve
- Veteran Business Ent
- Small Business
- Stocking Supplier
- Non-Stocking Supplier

UNSPSC Codes

- ▷ 30100000 - Structural components and basic shapes
- ▷ 30110000 - Concrete and cement and plaster
- ▷ 30120000 - Roads and landscape
- ▷ 30130000 - Structural building products
- ▷ 30140000 - Insulation
- ▷ 30150000 - Exterior finishing materials
 - ▷ 30151500 - Roofing materials
 - ▷ 30151600 - Roofing accessories
 - ▷ 30151700 - Rain gutters and accessories
 - ▷ 30151800 - Siding and exterior wall materials
 - ▷ 30151900 - Finishing materials and products
 - ▷ 30152000 - Fencing

Find only vendors that have all selected UNSPSC codes

Find only vendors that have at least one selected UNSPSC code



Search Results

Advanced Search

Show 25 entries

Export to Excel | Reset Search Criteria

Supplier (click on name to display full record)	Contact	Address	SB Validity Dates	SDB Validity Dates	VBE Validity Dates	COSTARS
ADVANCED AUDIO VISUAL SALES INC	JOHN GREENE DIRECTOR OF SALES John.Greene@advancedav.com (Phone) 610-719-6194 (Fax) 610-692-8421	208 CARTER DRIVE SUITE 7 WEST CHESTER, PENNSYLVANIA 19382 (Phone) 610-719-6194				No
ADVANCED BUILDING CONTROLS LLC (DBA ADVANCED BUILDING CONTROLS LLC)	Craig Connely CCONNELLY@ADVANCEDBLDGCONTOLS.COM (Phone) 215-520-9964	PO BOX 303 HOLICONG, PENNSYLVANIA 18928 (Phone) 215-520-9964	2/11/2019- 2/28/2021			No
ADVANCED BUILDING PERFORMANCE INC ()	Pei Pei Cavalier PEIPEI@ABPCX.COM (Phone) 301-760-9989	11225 HURDLE HILL DR POTOMAC, MARYLAND 20854 (Phone) 301-760-9989 abpcx.com	12/20/2019- 12/20/2021	12/20/2019- 12/20/2021		No
ADVANCED CLEANING SOLUTIONS LLC (ADVANCED CLEANING SOLUTIONS LLC)	Nicholas Wach cleanteam@advancedsolutionsPA.com (Phone) 610-597-0012	PO BOX 3223 ALLENTOWN, PENNSYLVANIA 18105	2/27/2018- 3/31/2020	2/27/2018- 3/31/2020	2/27/2018- 3/31/2020	No

Certified Small Businesses

- Advanced Building Controls LLC
- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Small Diverse Businesses

- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

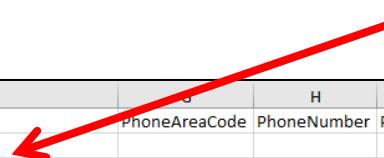
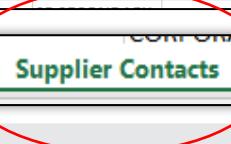
Veteran Business Enterprise

- Advanced Cleaning Solutions LLC



Excel Export Results – Supplier Contacts

Excel Export Results includes Vendor ID, Supplier Name, Contact Name, Email, Phone, Fax

A	B	C	D	E	F	G	H	I	J	K	
1	SAP Number	Supplier Name	Contact Name	Name	Title	Email	PhoneAreaCode	PhoneNumber	PhoneEx	FaxAreaCo	FaxNumber
2	104279	CA WEISS SALES LLC	CORPORATE			caweiss@comcast.net					
3	104279	CA WEISS SALES LLC	SB MAIN	KRISTY ZARICHNIAK		kristyz@comcast.net	610	4588864	610	4588875	
4	119565	DUFF SUPPLY COMPANY	CORPORATE	ALEX DUFFINE	VP	DFRANK@DUFFCOMPANY.COM	610	2754453	147	610	2796299
5	119565	DUFF SUPPLY COMPANY	REMITTO	BARB COHEN		bcohen@duffco.com	610	2754453	149	610	2756761
6	119565	DUFF SUPPLY COMPANY	SB MAIN	ALEX DUFFINE		aduffine@duffco.com	610	2754453			
7	119565	DUFF SUPPLY COMPANY	SB SECONDARY			info@duffco.com					
8	122594	HOUCK SERVICES INC	CORPORATE			jherrold@houcks.com					
9	122594	HOUCK SERVICES INC	SB MAIN	JARROD HERROLD		jherrold@houcks.com	717	6573302	717	6579805	
10	122594	HOUCK SERVICES INC	SB SECONDARY			kgussler@houcks.com					
11	134717	PENN STATE ELECTRIC MECHANICAL	CORPORATE			razmataz33@aol.com					
12	134717	PENN STATE ELECTRIC MECHANICAL	SB MAIN	RAZ SUGARWALA		razmataz33@aol.com	717	2992090	717	2992297	
13	134717	PENN STATE ELECTRIC MECHANICAL	SB SECONDARY			ksing6027@yahoo.com					
14	135270	BARBARA J SALES ASSOC INC	CORPORATE			barb@barbarajsles.com					
15	135270	BARBARA J SALES ASSOC INC	SB MAIN	BARBARA SMITH		barb@barbarajsales.com	412	5233398	800	8137122	
16	135270	BARBARA J SALES ASSOC INC	SB SECONDARY			willsmith@willjservices.com					
17	137893	IDA YEAGER SALES INC	CORPORATE			idayeagersales@zoominternet.net					
18	137893	IDA YEAGER SALES INC	SB MAIN	IDA LAQUATRAYEAGER		idayeagersales@zoominternet.net	724	4525260	724	4521072	
19	144061	CONSTRUCTION TOOL SERVICE INC	CORPORATE			ehuss@constructiontoolservice.com					
20	144061	CONSTRUCTION TOOL SERVICE INC	SB MAIN	BETTY CONNELLY		bconnelly@constructiontoolservice.com	412	6816673	412	6819185	
21	144061	CONSTRUCTION TOOL SERVICE INC	SB SECONDARY			bgoodwork@aol.com					
22	145576	BURKE & MICHAEL INC	CORPORATE			MARYFRANCES@BURKEANDMICHAEL.COM					
23	145576	BURKE & MICHAEL INC	SB MAIN	MARY FRANCES HOGAN		maryfrances@burkeandmichael.com	412	3212301	412	3214582	
24	153927	COOPER TRADING INC	CORPORATE			cti@ctipa.com					
25	153927	COOPER TRADING INC	SB MAIN	PETER COOPER		pete@ctipa.com	724	8618830	724	8618832	
26	153927	COOPER TRADING INC	SB SECONDARY			debbie@ctipa.com					
27	157009	CONTRACT HARDWARE AND SUPPLY	CORPORATE			cristil@chsupplyinc.com					
28	157009	CONTRACT HARDWARE AND SUPPLY	SB MAIN	BRAD BOTTEICHER		bradb@chsupplyinc.com	814	9412340	814	9412342	

Suppliers	Supplier Addresses	Supplier Contacts	Counties	Supplier Classifications	ITQs	ITQ Contracts	UNSPSC Codes



Upcoming Supplier Search Training

The training will focus on the basics of the supplier search process including recognizing the UNSPSC Codes Structure, accessing the DGS Supplier Search Database and Searching for Small, Small Diverse and Small Veteran Owned Businesses to gain a better understanding of supplier search results.

The 30-minute sessions will be offered via Teams on-line presentations on the following dates in 2022: **(No RSVP Required)**

Targeted Audience (External): Potential prime contractors that conduct business with the commonwealth who want to learn the basics of finding DGS certified small diverse and veteran owned businesses.

- May 11th, 10:00 am – 10:30 am
- May 25th, 10:00 am – 10:30 am
- June 1st, 10:00 am – 10:30 am
- June 8th, 10:00 am – 10:30 am
- June 15th, 10:00 am – 10:30 am
- June 29th, 10:00 am – 10:30 am
- July 13th, 10:00 am – 10:30 am
- July 27th, 10:00 am – 10:30 am
- August 3rd, 10:00 am – 10:30 am
- August 10th, 10:00 am – 10:30 am
- August 24th, 10:00 am – 10:30 am

Microsoft Teams meeting

[Join on your computer or mobile app](#)

[Click here to join the meeting](#)

Meeting ID: 293 754 842 172

Passcode: Uhqm2D

[Download Teams](#) | [Join on the web](#)

[Or call in \(audio only\)](#)

[+1 267-332-8737,,690952530#](tel:+12673328737) United States, Philadelphia

Phone Conference ID: 690 952 530#

[Find a local number](#) | [Reset PIN](#)

Recording or transcription of this meeting may not occur without consent of all participants, as required by law, and must adhere to Commonwealth policies. For more information click the legal link.

[Learn More](#) | [Meeting options](#) | [Legal](#)

[BDISBO Events Page](#)



New Forms and Processes

SDB/VBE Instructions – *SDB-1/VBE-1 READ*

- SDB/VBE Participation Submittal – *SDB-2/VBE-2*
- SDB/VBE Utilization Schedule – *SDB-3/VBE-3*
- Letter of Commitment – *SDB 3.1/VBE-3.1*
- Guidance for Good Faith Effort (GFE) Waiver –
SDB-4/VBE-4 READ
- GFE Waiver – *SDB-5/VBE-5*



SDB Submittal Instructions – SDB-1

SDB-1
**INSTRUCTIONS FOR COMPLETING THE SMALL DIVERSE BUSINESS (SDB)
PARTICIPATION SUBMITTAL AND SDB UTILIZATION SCHEDULE.**

PLEASE READ BEFORE COMPLETING THESE DOCUMENTS
Bidders/Offerors do not need to return SDB-1 with their SDB Participation Submittal

The following instructions include details for completing the SDB Participation Submittal (SDB-2) which Bidders or Offerors must submit in order to be considered responsive.

The following instructions also include details for completing the SDB Utilization Schedule (SDB-3), which Bidders or Offerors must submit for any portion of the SDB participation goal the Bidder or Offeror commits to meeting.

A Bidder/Offeror's failure to meet the SDB participation goal in full or their failure to receive an approved Good Faith Efforts waiver for any unmet portion of the SDB participation goal will result in the rejection of the Bid or Proposal as nonresponsive.

I. **SDB Participation Goal:** The SDB participation goal is set forth in the eMarketplace advertisement and also in the Notice to Bidders. The Bidder/Offeror is encouraged to use a diverse group of subcontractors and suppliers from the SDB classifications to meet the SDB participation goal.

II. **SDB Eligibility:**

1. **Finding SDB firms:** Offerors can access the directory of **DGS-verified** SDB firms from the DGS Supplier Search directory at: <http://www.dgs.internet.state.pa.us/suppliersearch>
2. **Only SDBs verified by DGS** and as defined herein may be counted for purposes of achieving the SDB participation goal. In order to be counted for purposes of achieving the SDB participation goal, the SDB firm, including an SDB prime, **must be DGS-verified for the services, materials or supplies that it has committed to perform on the SDB Utilization Schedule (SDB-3)**. A firm whose SDB verification is pending or



SDB Submittal – SDB-2

CRITICAL
✓ Check One, and
Only One, Box

SDB-2 SDB PARTICIPATION SUBMITTAL

ONLY ONE, AND ONLY ONE, BOX. FAILURE TO COMPLY WILL RESULT IN REJECTION OF YOUR BID/PROPOSAL.

Click on bold titles to navigate to that specific page.

I agree to meet the SDB

participation goal in full.

I have completed and am submitting with my bid or proposal an SDB Utilization Schedule (SDB-3), which is required in order to be considered for award.

I am requesting a partial waiver of the SDB participation goal

After making good faith outreach efforts as more fully described in the Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal, I am unable to achieve the total SDB participation goal for this solicitation and am requesting a partial waiver of the SDB participation goal.

I have completed and am submitting with my bid or proposal both of the following, which are required in order to be considered for award:

1. an SDB Utilization Schedule

I am requesting a full waiver of the SDB participation goal

After making good faith outreach efforts as more fully described in the Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal, I am unable to achieve any part of the SDB participation goal for this solicitation and am requesting a full waiver of the SDB participation goal.

I have completed and am submitting with my bid or proposal a Good Faith Efforts Waiver Request for



SDB Utilization Schedule – SDB-3

CRITICAL
✓ Verify SDB/VBE
validity

SDB-3 SDB UTILIZATION SCHEDULE

Identify all SDBs (including where applicable a prime bidder or offeror is self-performing a portion of the work) that will meet the SDB participation goal (add additional pages if necessary). Submit a Letter of Commitment (SDB-3-1) for each SDB subcontractor, supplier, or manufacturer (add additional Letters of Commitment as necessary).

SDB Name SAP Vendor Number (6-digit number provided by SDB) SDB Verification Number (located on DGS SDB verification)	Type of SDB (check all that apply)	Description of Work to be Performed (Statement of Work/Specification reference)	% Commitment (or % of work to be self-performed by SDB bidder/offeror)	Dollar Value of Commitment (after applying any calculation per SDB-1, Section IV, Calculating SDB participation)
Name: <u>ABC IT Solutions</u> SAP Vendor Number: <u>123456</u> SDB Verification Number: <u>123456-2016-09-SB-M</u>	MBE	IT staffing resources	%	\$
Name: SAP Vendor Number: SDB Verification Number:	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTB <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: SAP Vendor Number: SDB Verification Number:	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTB <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: SAP Vendor Number: SDB Verification Number:	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTB <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: SAP Vendor Number: SDB Verification Number:	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTB <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Attach additional sheets if necessary			Total % SDB commitment: <u>0</u>	Total \$ amount: <u>\$0</u>



Letter of Commitment SDB-3.1

CRITICAL
✓ Complete all shaded areas.

SDB-3-1
LETTER OF COMMITMENT

This Letter of Commitment (SDB-3.1) serves as confirmation of the commitment by the prime Bidder or Offeror to the Small Disadvantaged Business (SDB) on the below-referenced Solicitation/Project.

Bidder/Offeror Information		
Business Name:		
Address		
Point of Contact		
Telephone number		
Email address		

Services/Supplies and Time Frame. If Bidder/Offeror is the successful vendor, the SDB shall perform or provide the following services or supplies during the term of the prime contract, as more specifically set forth below:

Services or supplies the VBE will provide:	
Specific Time Frame the VBE will provide the services or supplies:	

Dollar Value of Commitment. These services or supplies represent \$ _____ for the term of the contract.

SDB verified. By signing below, the SDB represents that it meets the SDB requirements set forth in the Solicitation and all required documentation has been provided to the Bidder/Offeror for its SDB submission.

Sincerely,

Printed name

Acknowledged

Printed name

SDB to expect a letter and SIGN it!



Guidance to Document GFE SDB-4

READ, READ, READ

- The ability or desire of a prime contractor to perform the work of a contract with its own organization does not relieve the Offeror of the responsibility to make Good Faith Efforts to meet the SDB participation goal.
- Prime must complete all components of the GFE paperwork. Details/Evidence are important, proof is required.
- Carefully review SDB and VBE submittal Instructions, specifically Section VI of SDB/VBE-1 which lists pertinent items as Fatal errors.



Good Faith Efforts Packet SDB-5

Good Faith Efforts (GFE) Partial or Full Waiver

- Identified Items of Work Applicant Made Available to SDBs (Part 1)
- Identified SDBs and Record of Solicitations (Part 2)
- SDB Outreach Compliance Statement (Part 3)
- Additional Information Regarding Rejected SDB Quotes (Part 4)
- SDB Subcontractor Unavailability Certificate (Part 5)



SDB GFE Documentation – SDB-5

SDB-5

GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST OF SDB PARTICIPATION GOAL

Project Description:	
Commonwealth Agency Name:	
Solicitation #:	
Solicitation Due Date and Time:	
Bidder/Offeror Company Name:	
Bidder/Offeror Contact Name:	
Bidder/Offeror Contact Email:	
Bidder/Offeror Contact Phone Number:	

Complete all five parts

Part 1 – Identified Items of Work Offeror Made Available to SDBs

Identify those items of work that the Offeror made available to SDBs. This includes, where appropriate, those items the Offeror identified and subdivided into economically feasible units to facilitate the SDB participation. For each item listed, show the anticipated percentage of the total contract amount. It is the Offeror's responsibility to demonstrate that enough work to meet the SDB participation goal was made available to SDBs, and the total percentage of the items of work identified for SDB participation met or exceeded the SDB participation goal set for the procurement.

Identified Items of Work	Was this work listed in the solicitation?	Does Offeror normally self-perform this work?	Was this work made available to SDB Firms? If not, explain why.
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no



GFE Waiver – Part 1

Identify Items of Work Offeror Made Available to SDBs

CRITICAL
✓ List all components of work offered for contract.

Identify items of work that the Offeror made available to SDBs. This includes, where appropriate, those items the Offeror identified as possible units to facilitate the SDB participation. For each item listed, show the anticipated percentage of the total work that enough work to meet the SDB participation goal was made available to SDBs, and the total percentage of work for which SDB participation met or exceeded the SDB participation goal set for the procurement.

Work Item	Was this work listed in the solicitation?	Does Offeror normally self-perform this work?	Was this work made available to SDB Firms? If not, explain why.
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

Attach additional sheets if necessary.



GFE Waiver – Part 2

CRITICAL
✓ Specifics and
Details are
Important

Identified SDBs and Record of Solicitations

Offeror is required to provide quotes for the Identified Items of Work made available for SDB participation. Include the name of the SDB for which quotes were solicited, date and manner of initial and follow-up solicitations, whether the SDB provided a quote, and the amount being used toward meeting the SDB participation goal. SDBs used to meet the SDB participation goal must be listed on the Subcontractor Selection Schedule (SDB-2).

Copies of all written solicitations and documentation of follow-up calls to SDBs must be attached to this form. For each Identified SDB below, Offeror should submit an SDB Subcontractor Unavailability Certificate signed by the SDB or a statement from the Offeror that the SDB refused to sign the SDB Subcontractor Unavailability Certificate.

Name of Identified SDB and Classification	Describe Item of Work Solicited	Initial Solicitation Date & Method	Follow-up Solicitation Date & Method	Details for Follow-up Calls	Quote Received?	Quote Used?	Reason Quote Rejected
SDB Name: <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date and Time of Call: Spoke with: Left Message:	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	Used other SDB Used non-SDB Self performing
SDB Name: <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date and Time of Call: Spoke with: Left Message:	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	Used other SDB Used non-SDB Self performing

Attach additional sheets as necessary.



GFE Waiver – Part 3

SDB Outreach Compliance Statement

CRITICAL
✓ Documentation for
Part 1

1. List the Identified Items of Work for subcontracting opportunities for the solicitation along with specific work categories:

2. Attach to this form copies of written solicitations (with Bid or Proposal instructions) used to solicit Identified SDBs for these subcontract opportunities.

3. Offeror made the following attempts to contact the Identified SDBs:

4. Bonding Requirements (Please Check One):

This project does not involve bonding requirements.

Offeror assisted Identified SDBs to fulfill or seek waiver of bonding requirements.
(DESCRIBE EFFORTS):

5. Pre-Bid/Proposal Conference or Supplier Forum (Please Check One):



GFE Waiver – Part 4

Additional Information Regarding Rejected SDB Quotes

CRITICAL
✓ Documentation for
Part 2

Part 2 indicates that an SDB quote was rejected because the Offeror is using a non-SDB or is self-performing the work. For each of the Identified Items of Work, state whether the work will be self-performed or performed by a non-SDB, and if self-performed, state the name of the non-SDB firm. Also include the names of all SDBs and non-SDB firms that provided a quote and the amount of

Describe Identified Items of Work not being performed by SDBs (include specific section from bid or proposal)	Self-performing or using non-SDB (provide name of non-SDB if applicable)	Amount of non-SDB quote \$	Name of other firms that provided quotes and whether they are SDB	Amount quoted \$	Reason why SDB quote was rejected along with brief explanation
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name: _____		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name: _____		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name: _____		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name: _____		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name: _____		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name: _____		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name: _____		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name: _____		<input type="checkbox"/> price



GFE Waiver – Part 5

Subcontractor Unavailability Certificate

CRITICAL
✓ Required for each
vendor listed in Part
1

I, _____, am hereby certified that the firm of _____
(Name of SDB)

located at _____
(Number) _____ (Street)

_____ (City) _____ (State) _____ (Zip)

was offered an opportunity to bid on Solicitation No. _____

by _____
(Name of Prime Contractor's Firm)

2. _____ (SDB), is either unavailable for the work/service or
unable to prepare a Proposal for this project for the following reason(s):

_____ (Signature of SDB's Representative) _____ (Title) _____ (Date)



Best Practices

Do's

- Read the solicitation and all instructions completely.
- Submit SEPARATE SDB and VBE submittal forms.
- Validate subcontractor SDB/VBE status in DGS Supplier Database.
- Ensure that all appropriate forms are completed and signed correctly.
- Submit questions early per the solicitation requirements.

Don'ts

- Make any assumptions.
- Copy SDB submittal paperwork. Download and complete the VBE submittal separately, titles and accuracy matter.
- Skip any portion of the GFE request documentation.
- Forget to verify subcontractor status as current SDB/VBE in DGS Supplier Database.



Notes

- READ, READ, READ, solicitation instructions completely.
- Subcontractors identified in SDB-3, Utilization Schedule must be validated as of bid due date and time.
- Model Form SDB/VBE Subcontractor Agreement - is provided for informational purposes only. To be completed by award winning vendor only.



REMINDER

**Failure to submit
fully completed SDB
and VBE submittal
packets or GFE
waiver request
documentation will
result in removal of
your bid for award
consideration**

Questions?



BDISBO Contact Info

Bureau of Diversity, Inclusion and Small Business Opportunities

North Office Building
401 North Street, Room 611
Harrisburg, PA 17120-0500
717.783.3119
GS-BDISBO@pa.gov



Contractor Partnership Program

Bureau of Employment Programs
Hoa Pham, Bureau Director

What is the Contractor Partnership Program (CPP)?

The CPP is a collaboration between the Pennsylvania Department of Human Services (DHS) and its contractors to increase the employment rate of TANF beneficiaries.

Contractors who hold agreements meeting certain criteria with DHS are required to establish a TANF hiring goal and implementation plan that supports TANF beneficiaries in obtaining employment with the contractor, grantee, or their subcontractors.

What are the benefits for Contractors and Grantees?

- Fulfills workforce needs by connecting entities to a pool of job candidates.
- Connects entities to PA's Employment & Training network who can assist in developing workforce training, hiring and retention at no cost.
- Entities may be eligible for tax credits for hiring individuals receiving TANF such as the Work Opportunity Tax Credit

WOTC

- Establishes your entity as part of a collective solution to lifting people out of poverty.

RFP Requirements

- The RFP contains an overview of CPP in Appendix G.
- Offerors should submit the information being requested in Section 3 of Appendix G as their CPP Submittal.
- This submittal will NOT be part of the scoring criteria, but it must be completed. After selection for negotiations, DHS will review the selected Offeror's CPP Submittal and may approve or request changes as part of negotiations.

Implementing a Hiring Plan

- As part of its CPP submittal, each Offeror should submit a hiring target; subgrantees must be included if part of the grant
- Offerors should review the positions the organization currently offers and anticipate their needs not only as a result of being awarded a contract but generally throughout the organization for:
 - Both degree and non-degree positions;
 - CPP hires are not specific to the work outlined in the contract; and
 - All positions should be considered, not just positions assigned to the contract work.

How is the hiring target determined?

As part of their CPP submittal, Offerors will report their number of Pennsylvania hires annually for the past three years and calculate their average number of hires per year; the target will be 10% of the average, **for each year of the contract**.

The CPP submittal must also contain and take into consideration any hires made by subcontractors within the same period following the same calculation.

Contractor and subcontractor hires should then be combined to create the hiring target.

Program Requirements

- Submit a hiring goal. The hiring goal should be 10% of the average of annual PA hires over the past 3 years.
- Establish a Business Folder in the Commonwealth Workforce Development System (CWDS) and ensure contact information remains current.
- Implement the hiring plan (post jobs, connect with Employment and Training programs to find qualified candidates)
- Complete quarterly employment forms via the Commonwealth Workforce Development System (even if no hires were made during that quarter).
Q1-October 15 Q3-April 15
Q2-January 15 Q4-July 15
- Maintain communication with program office contract monitors or CPP staff on progress and challenges.

CWDS Data Entry Instructions will be provided once the contract is awarded

- **Contract Specific:** The CPP requirement is contract specific, meaning each contract held with the Department may require a hiring goal. If a contractor has multiple contracts with DHS, they may have multiple goals.
- **Subcontractors:** Hires made by subcontractors also count towards the CPP hiring goal. All hires made by the grantee and subgrantees should be used to determine the 10% hiring target. Subcontractors may also be designated to complete the quarterly reports in CWDS.
- **Eligible positions:** Hires can be for any position; the position does not have to be related to the specific contract project(s). TANF beneficiaries possess a wide range of skill sets and can fulfill a variety of positions, depending on the individual's background and experience. Common industry-specific certifications include areas such as:
 - Data Entry Specialist
 - Customer Service
 - Health Care
 - Administrative Services

How can DHS connect selected Offerors with TANF beneficiaries?

- Selected Applicants can post available positions via PA CareerLink® online: pacareerlink.pa.gov
- DHS can connect entities with local employment and training programs including the Employment Advancement and Retention Network (EARN), Work Ready, and Keystone Education Yields Success (KEYS) providers who work directly with TANF beneficiaries.

EARN and Work Ready

Providers	Participant Services
22 Local Workforce Development Boards	<p>With a major redesign beginning July 2020, EARN and Work Ready now provide the following services to participants:</p> <ul style="list-style-type: none">• Individualized coaching or case management• Support to address employment barriers• Employability skills development• Counseling services
11 Community Action Agencies	<ul style="list-style-type: none">• Access to training programs leading to credentials• Job placement and job search assistance• Support services such as child care and transportation• A minimum of one year of retention services to help navigate the transition into the workforce

Keystone Education Yields Success (KEYS)

Providers	Services
14 Community Colleges	<p>The KEYS Program supports participants who are attending an approved program primarily at Pennsylvania's community colleges. Services include:</p> <ul style="list-style-type: none">• On-site support to pursue certificates and degrees• Help with navigating college requirements• Assistance with financial aid and scholarship applications• Support services such as child care, transportation, books, and supplies• Connections to other college services such as academic advising, tutoring, student activities, and career services

What are the responsibilities of oversight staff?

The Bureau of Employment Programs (BEP) and Project Monitors will work together to:

- Provide support to selected Applicants
- Ensure that the selected Applicants designate and maintain a point of contact for CPP purposes
- Support selected Applicants in making connections to job candidates and provide technical assistance as needed
- Conduct outreach when selected Applicants fail to submit quarterly reports in the Commonwealth Workforce Development System (CWDS)
- Review CPP targets during annual monitoring and targeted technical assistance visits
- Share quarterly updates with DHS leadership

Contact Information

Contractor Partnership Program
Email: RA-BETPCPP@pa.gov

PA CareerLink® online:
pacareerlink.pa.gov

- The Project Timeline includes:
 - May 22, 2023 – RFP was Issued
 - June 1, 2023 at 2:00 PM - Pre-proposal Conference
 - June 5, 2023 by 12:00:00 PM – Deadline to Submit Questions
 - June 16, 2023 - Answers to questions posed will be posted as an Addendum in JAGGAER and on www.emarketplace.state.pa.us
 - July 6, 2023 by 12:00:00 PM - Due date for proposals. Sealed proposals must be received by the Issuing Office by 12:00:00 PM EST

- This concludes the pre-proposal conference.
- Answers to all questions posed will be posted to JAGGAER and [ww.emarketplace.state.p.us](http://www.emarketplace.state.p.us) by June 16, 2023. No further questions will be entertained or answered after this date.

Holly Zeiders, Issuing Officer
Department of Human Services
Bureau of Procurement and Contract Management
Room 832 Health and Welfare Building
625 Forster Street
Harrisburg, PA 17120

Any contact with the Department concerning this RFP
must be through the RFP Issuing Officer.