

# **Pennsylvania Patient & Provider Network (P3N)**

## **Request for Proposals (RFP) #17-23**

### **Pre-Proposal Conference**

### **August 8, 2024**

- Martin Ciccocioppo - Director  
Pa eHealth Partnership Program
- Teresa Allen – Issuing Officer  
DHS Bureau of Procurement & Contract Management
- Audrey Smith - DGS Bureau of Diversity, Inclusion and Small Business Opportunities
- Krista Schubert – DHS Bureau of Employment Programs, Contractor Partnership Program

# Agenda



- Introductions
- Ground Rules
- Critical Points
- Project Overview
- Tasks Overview
- Technical Submittal Overview
- Small Diverse Business and Veterans Business Enterprise Overview
- Contractor Partnership Program
- Timeline

# Ground Rules



- The Department will post this presentation and attendance list as an addendum on the DGS website (<http://www.emarketplace.state.pa.us/>) and in JAGGAER following this presentation.
- All questions must be submitted via the Q&A Board in JAGGAER by August 9, 2024, by 4:00:00 PM EST.
- Answers to Potential Offeror questions will be posted on the DGS website (<http://www.emarketplace.state.pa.us/>) and in JAGGAER by August 23, 2024.
- Any changes to the RFP will be issued as a formal written addendum in accordance with Section #10 of the RFP Description.
- All communication concerning this RFP shall be made through the RFP Issuing Officer, Teresa Allen. Do not contact any other Commonwealth personnel concerning this RFP.

- To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFP carefully and submit a complete timely proposal, including the required signature.
- Follow the proposal format as detailed in RFP Description Section #14.B. Include the appropriate heading descriptions, respond to all sections of the Technical and Cost Submittals, 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 (SDB), Veteran Business Enterprise Participation (VBE), and Contractor Partnership Program (CPP).
- The references completing the Corporate and Key Personnel Reference Forms must submit the completed forms electronically to [RA-PWBPCMReferForms@pa.gov](mailto:RA-PWBPCMReferForms@pa.gov) as set forth in Section #I-3 B and D of the Technical Submittal.

- **Do not include any cost data in the Technical portion of your proposal.**
- Offerors must submit a complete response to this RFP in JAGGAER.
- Proposals must adhere to the four Mandatory Responsiveness Requirements set forth in Section #32 of the RFP JAGGAER Description. These 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 the RFP.
- Proposals (the electronic copy in JAGGAER) and the electronic copies of the completed Corporate and Key Personnel Reference Forms must be received by 12:00:00 pm on September 27, 2024.
- The resulting contract will be for a term of five years with five additional one-year renewal options.

# Critical Points (cont.)



- The RFP will be evaluated based on the following criteria:
  - Technical – 65% of the total available points
  - Cost – 35% of the total available points

To be considered a responsible Offeror, and thus eligible for selection for Best and Final Offers or contract negotiations, 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:
  - Understanding the Project;
  - Offeror Qualifications;
  - Personnel Qualifications; and
  - Soundness of Approach.

This is a broad overview of the project and the programs involved. Please refer to the RFP Description Section #4 and #5 for additional details.

This RFP is for the implementation, hosting, management, and maintenance of the Pennsylvania Patient and Provider Network (P3N). It includes the transition of existing Health Information Organizations (HIOs), services, and data from the current platform, onboarding of new stakeholders to the P3N, implementation of new services to support robust Health Information Exchange (HIE) in Pennsylvania, data analytics and reporting, and increased participation in state, federal, and interstate exchange.

# Project Overview



- As detailed in the JAGGAER Description Section #5.B, the Department is seeking an Offeror to:
  - Facilitate discovery and requirements review sessions with stakeholders to implement and transition to the new P3N Platform;
  - Develop customizations as necessary to meet individual stakeholder onboarding needs during transition;
  - Perform testing;
  - Provide support services related to the P3N;
  - Host and maintain the P3N;
  - Deploy releases and patches across the P3N and supporting systems;
  - Communicate and participate in the established governance structures for the stakeholder community; and
  - Establish plans and define activities to onboard and support additional stakeholders and services.

- Offerors should respond to all tasks listed in the Technical Submittal and propose how the Offeror will satisfy each of the tasks. Please reference the Technical Submittal in Buyers Attachments for more information.
  
- Transition
  - Planning – including discovery, implementation and transition planning, and requirements management
  - Design – including solution and interface design and configuration and data migration and validation
  - Testing and implementation

- P3N Functionality and Services
  - Enterprise Master Patient Index
  - Provider Directory
  - Patient Portal
  - Provider Portal
  - Cross-Enterprise Document Sharing Registry and Clinical Data Repository
  - System Connectivity
  - System Administration

- P3N Functionality and Services (continued)
  - Consent Registry
  - SPD Tagging and Filtering
  - Encounter Notification Service
  - Clinical Data Push Service
  - Public Health Gateway
  - Business Intelligence, Data Analytics, and Reporting
  - Provider-Patient Relationship Service

- Program and Project Management Services
  - Change Management
  - Defect Management
  - Quality Assurance
  - Governance
- Maintenance and Operation (M&O)
- Solution Support Services
- System Documentation
- Turnover

This is a broad list of tasks. Please pay close attention to the details within the Technical Submittal of the RFP.

- Offerors should respond to all areas of the Technical Submittal and propose how the Offeror will satisfy each section of the Technical Submittal. Please refer to the RFP for more information.
- Please pay close attention to the details within the Technical Submittal of the RFP and provide a complete response to each section of the Technical Submittal.

## Goal Setting Information Session

RFP #17-23  
Pennsylvania Patient & Provider  
Network (P3N)

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Issuing Officer –  
Teresa Allen  
[RA-PWRFPQUESTIONS@PA.GOV](mailto:RA-PWRFPQUESTIONS@PA.GOV)

8/9/2024



# 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

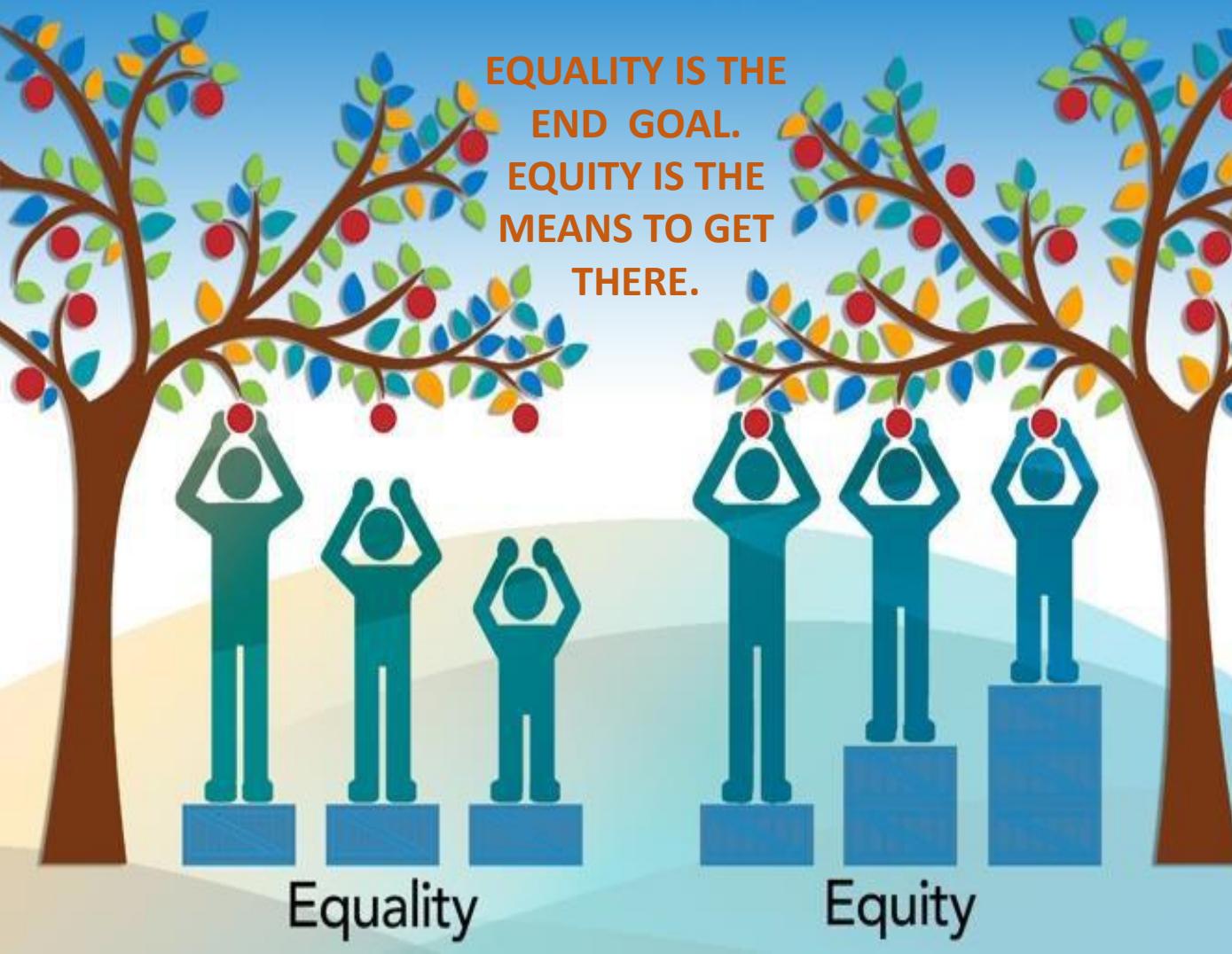
Recognizing the individuality and the value of *every* person is essential to understanding the concept of diversity.



# 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*.





The image is a conceptual illustration comparing equality and equity. It features two groups of three stylized human figures each, standing under two identical trees with brown trunks and branches bearing red, blue, and yellow leaves. The figures are teal-colored. In the 'Equality' group on the left, each figure is standing on a separate blue rectangular base of the same height, and all three figures are reaching up to摘取 a red apple from the same low-hanging branch. In the 'Equity' group on the right, the three figures are standing on blue rectangular bases of increasing height from left to right, and all three figures are reaching up to摘取 a red apple from the same low-hanging branch. The background is a light blue gradient with soft, rounded hills at the bottom. The word 'Equality' is written in black at the base of the left group, and the word 'Equity' is written in black at the base of the right group. In the center, above the figures, is the text: 'EQUALITY IS THE END GOAL. EQUITY IS THE MEANS TO GET THERE.' The text is in a bold, orange, sans-serif font.

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

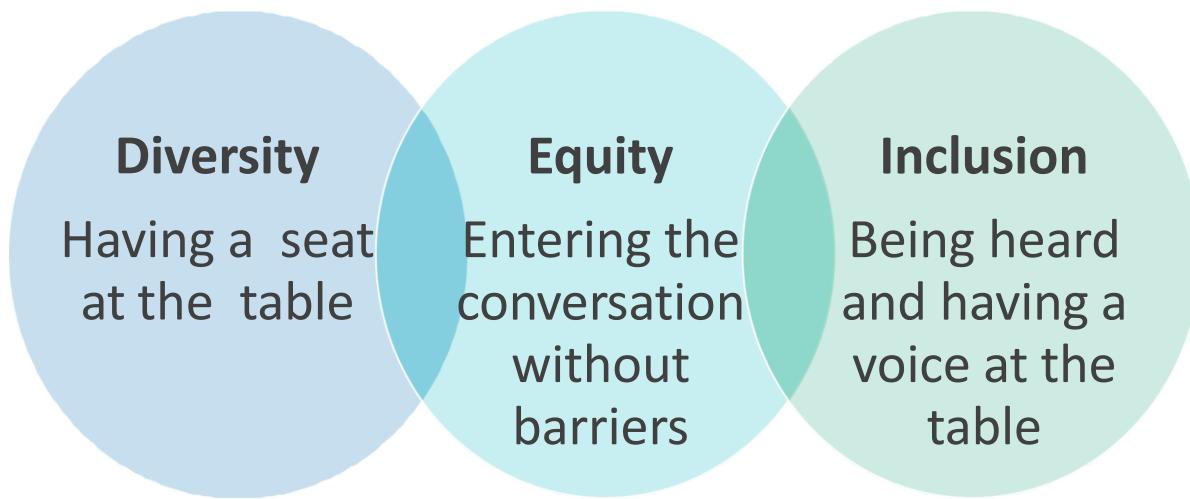
# Inclusion Defined

Inclusion is about:

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



# Diversity, Equity, and Inclusion



# 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

- #33.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**

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# Solicitation Specific Goals



RFP 17-23	SDB	VBE
	8%	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.

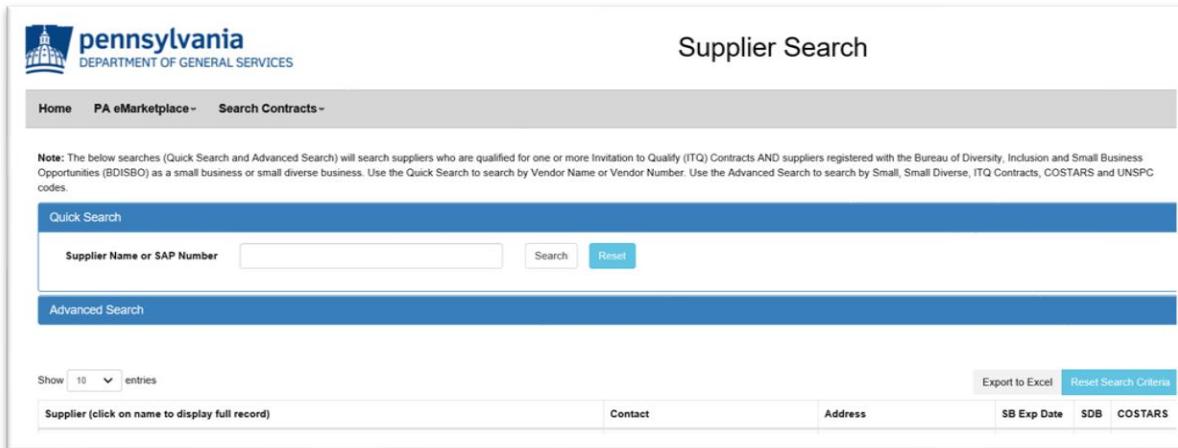
SB Eligibility Requirements	Small Diverse Business (SDB) Goal oriented	Veteran Business Enterprise (VBE) Goal oriented
<ul style="list-style-type: none"><li>•The business must be a for-profit, United States business.</li><li>•The business must be independently owned.</li><li>•The business may not be dominant in its field of operation.</li><li>•The business may not employ more than 100 full-time equivalent employees.</li><li>•The business may not exceed three-year average gross revenues of \$47 Million,.</li></ul>	<ul style="list-style-type: none"><li>➤ Woman Business Enterprise (WBE)</li><li>➤ Service-Disabled Veteran Business Enterprise (SDVBE)</li><li>➤ Minority Business Enterprise (MBE)</li><li>➤ LGBT Business Enterprise (LGBTBE)</li><li>➤ Disability-Owned Business Enterprise (DOBE)</li></ul>	<ul style="list-style-type: none"><li>➤ Veteran Business Enterprise (VBE)</li><li>➤ Service-Disabled Veteran Business Enterprise (SDVBE)</li></ul>

**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 header with the Pennsylvania state logo and 'pennsylvania DEPARTMENT OF GENERAL SERVICES'. Below the header, a navigation bar includes 'Home', 'PA eMarketplace -', and 'Search Contracts -'. The main content area is titled 'Supplier Search' and contains two search options: 'Quick Search' and 'Advanced Search'. The 'Quick Search' section has a text input for 'Supplier Name or SAP Number' with a 'Search' and 'Reset' button. A note below the search fields states: '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.' The 'Advanced Search' section is currently collapsed. At the bottom, there are buttons for 'Export to Excel' and 'Reset Search Criteria', and a table header with columns for 'Supplier (click on name to display full record)', 'Contact', 'Address', 'SB Exp Date', 'SDB', and 'COSTARS'. The table body is currently empty.

<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



# Advanced Search

Hierarchy	Category Number
Segment	<b>44000000</b>
Family	44120000
Class	44121700
Commodity	44121706

**Supplier Classifications**

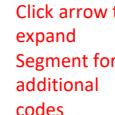
- Minority Business Enterprise
- Woman Business Enterprise
- LGBT Business Enterprise
- Disabled-Owned Business Enterprise
- Service-Disabled Veteran Business Enterprise
- Veteran Business Enterprise
- Small Business
- Stocking Supplier
- Non-Stocking Supplier
- Select all Classifications
- Select all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

Click arrow to expand Segment for additional codes 

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](#)

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  
20000000 - Fuels and Fuel Additives and Lubricants and Anti corrosive Materials  
21000000 - Mining and Well Drilling 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

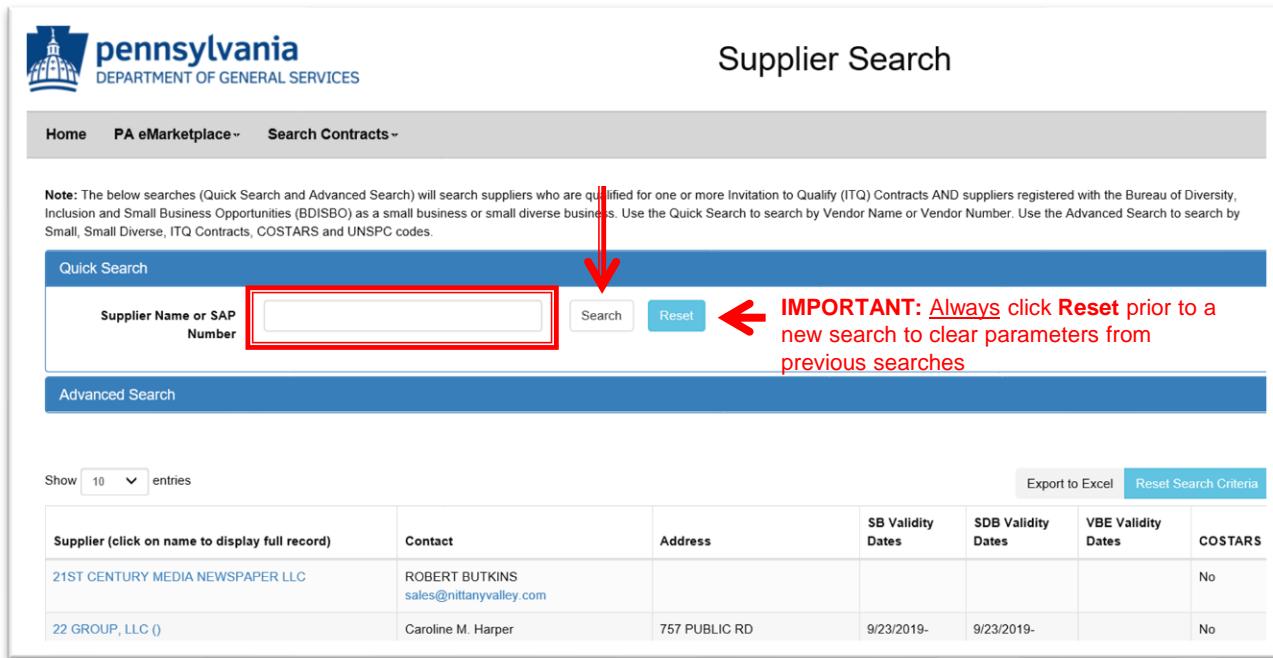
Find only vendors that have all selected UNSPSC codes  
 Find only vendors that have at least one selected UNSPSC code

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

**Browse and select one or more codes. Don't know the codes you want? Search for codes at [www.UNSPSC.org](#).** 



# Quick Search



**Supplier Search**

**Quick Search**

**Supplier Name or SAP Number**  **Search** **Reset**

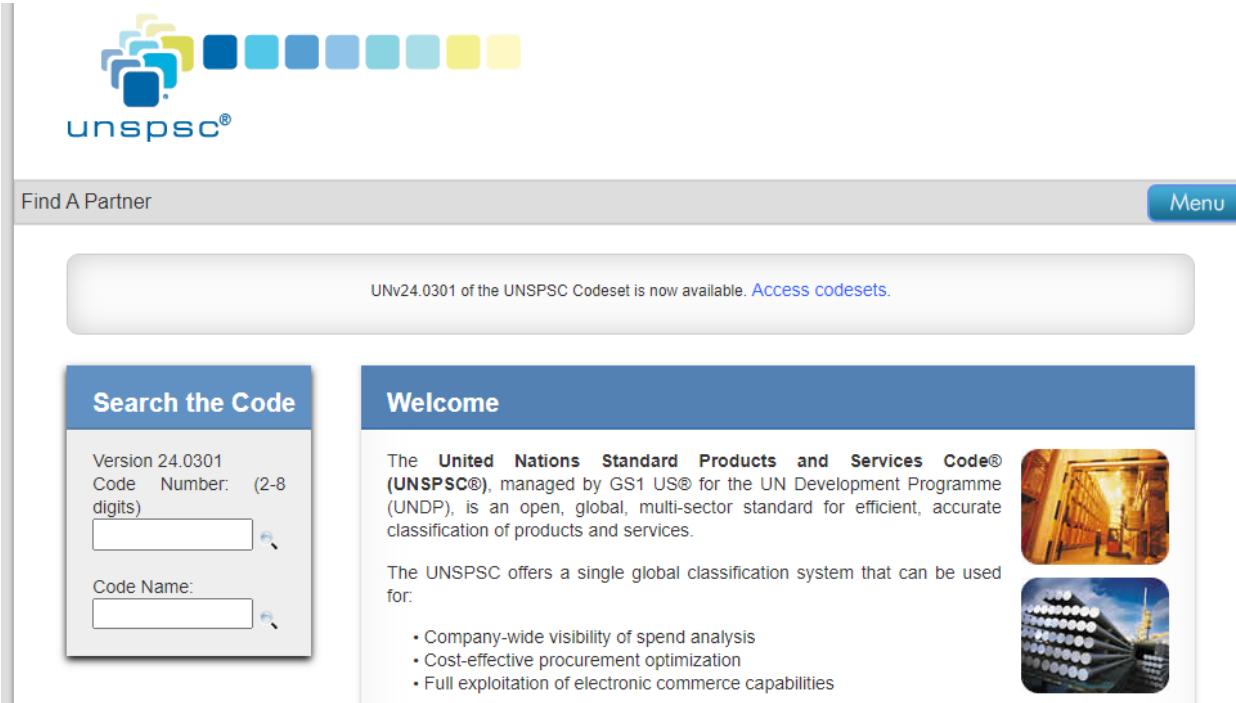
**IMPORTANT:** Always click **Reset** prior to a new search to clear parameters from previous searches

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

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



# UNSPSC Commodity Code Search



The screenshot shows the homepage of the UNSPSC Commodity Code Search. At the top, there is a logo consisting of a cluster of colored squares (blue, green, yellow) followed by the text "unspsc®". Below the logo is a navigation bar with "Find A Partner" and "Menu" buttons. A message box通知 "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

[HOME](#) [FAQS](#) [SUBSCRIBE](#) [LIBRARY](#) [CODESET-DOWNLOADS](#) [INITIATIVES](#) [EDUCATION](#) [FIND A PARTNER](#)

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
96131502	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 have all selected PA Counties

Find only vendors that have at least one selected PA County

**Supplier Classifications**

- Minority Business Enterprise
- Woman Business Enterprise
- LGBT Business Enterprise
- Disabled-Owned Business
- Service-Disabled Veteran Business Enterprise
- Veteran Business Enterprise
- 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** **Reset**

32



# Search Results



Advanced Search

show 25 entries

Export to Excel | Print 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.Green@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 Connelly <a href="mailto:CCONNELLY@ADVANCEDBLDGCONTOLS.COM">CCONNELLY@ADVANCEDBLDGCONTOLS.COM</a> (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 <a href="mailto:PEIPEI@ABPCX.COM">PEIPEI@ABPCX.COM</a> (Phone) 301-760-9989	11225 HURDLE HILL DR PO BOX 4400 PO BOX 4400, 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 War <a href="mailto:cleanteam@advancedsolutionsPA.com">cleanteam@advancedsolutionsPA.com</a> (Phone) 610-597-0012	PO BOX 3223 ALLENTOWN, PENNSYLVANIA 18105-3223	2/27/2018- 2/27/2020	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

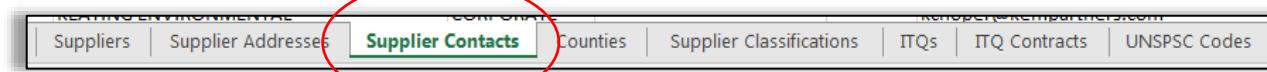
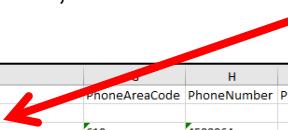
**Veteran Business Enterprise**

- 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@barbarajsales.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		pette@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



# 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 2023: **(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.

- 10:00 AM Aug 14 (Wed)
- 10:00 AM Aug 28 (Wed)
- 10:00 AM Sep 4 (Wed)
- 10:00 AM Sep 18 (Wed)
- 10:00 AM Oct 16 (Wed)
- 10:00 AM Oct 30 (Wed)
- 10:00 AM Nov 13 (Wed)
- 10:00 AM Nov 27 (Wed)
- 10:00 AM Dec 11 (Wed)

[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

**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.*

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> I agree to meet the SDB participation goal in full.   | <input type="checkbox"/> I am requesting a partial waiver of the SDB participation goal   | <input type="checkbox"/> I am requesting a full waiver of the SDB participation goal   |
| 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. | 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. | 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 both of the following, which are required in order to be considered for award:              | I have completed and am submitting with my bid or proposal a Good Faith Efforts Waiver Request for  |  |
| 1. an SDB Utilization Schedule   |   |  |



# SDB Utilization Schedule – SDB-3

**CRITICAL**  
✓ Verify SDB/VBE  
validity

## SDB-3 SDB UTILIZATION SCHEDULE

Provide a list of all known 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 calculations in SDB-1, Section IV, Calculating SDB participation)
Name: ABC IT Solutions SAP Vendor Number: 123456 SDB Verification Number: 123456-2016-09-SB-M	MBE	IT staffing resources	%	\$
Name: <input type="text"/> SAP Vendor Number: <input type="text"/> SDB Verification Number: <input type="text"/>	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBEE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: <input type="text"/> SAP Vendor Number: <input type="text"/> SDB Verification Number: <input type="text"/>	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBEE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: <input type="text"/> SAP Vendor Number: <input type="text"/> SDB Verification Number: <input type="text"/>	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBEE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: <input type="text"/> SAP Vendor Number: <input type="text"/> SDB Verification Number: <input type="text"/>	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBEE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Attach additional sheets if necessary			Total % SDB commitment: 0	Total \$ amount: \$0



# Letter of Commitment SDB-3.1

**CRITICAL**  
✓ Complete all shaded areas.

**SDB-3-1**  
**LETTER OF COMMITMENT**

This Letter of Commitment (SDB-3.1) is issued as confirmation of the commitment by the prime Bidder or Offeror (SDB) on the below-referenced Solicitation/Project.

On Name:

	Bidder/Offeror Information	SDB Information
Name	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Point of Contact	<input type="text"/>	<input type="text"/>
Telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>

**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:	<input type="text"/>
Specific Time Frame the VBE will provide the services or supplies:	<input type="text"/>

**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,  Acknowledged

Printed name  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 Offered 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

**CRITICAL**  
✓ List all components of work offered for contract

**Identify Items of Work Offeror Made Available to SDBs**

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

Item 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
	<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  
"who"

## 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, date and manner of initial and follow-up solicitations, whether the SDB provided a quote, and the reason for quote 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 listed 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	<input type="checkbox"/> Used other SDB <input type="checkbox"/> Used non-SDB <input type="checkbox"/> 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	<input type="checkbox"/> Used other SDB <input type="checkbox"/> Used non-SDB <input type="checkbox"/> Self performing

Attach additional sheets as necessary.



# GFE Waiver – Part 3

**CRITICAL**  
✓ Documentation  
for Part 1

## SDB Outreach Compliance Statement

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

## Addendum Information Regarding Rejected SDB Quotes

✓ Documentation  
for Part 2

Describe the 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"/> SDB		<input type="checkbox"/> price



# GFE Waiver – Part 5

**CRITICAL**

✓ Required for each vendor listed in Part 1

1

**Subcontractor Unavailability Certificate**

is 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)



# How to Meet the Goal

## 3 Scenarios

1. **Self-Perform as a **DGS-verified** SDB and/or VBE Prime vendor**
2. **Find Separate **DGS-verified** SDB and VBE vendors**
3. **Use a **DGS Dually-verified** SDB/VBE vendor**

### Submittal Forms

1. **Complete SDB-2&3/VBE-2&3 by putting your company name as vendor with appropriate percentage commitment to fulfill each goal amount.**
2. **Complete SDB-2&3/VBE-2&3 by noting SDB vendor on SDB submittal and VBE vendor on VBE submittal with appropriate percentage commitment to fulfill each goal amount.**
3. **Complete SDB-2&3/VBE-2&3 by noting same vendor on both SDB-2&3 and VBE-2&3 with highest percentage value commitment on BOTH forms**



# DGS Dually Verified SDB/VBE

## SDB-3 SDB UTILIZATION SCHEDULE

### Sample Scenario - 10% SDB Goal ; \$1,000.00 total project cost

List in the chart below SDBs (including where applicable a prime bidder or offeror is self-performing a portion of the work) that will be used to meet the SDB participation goal (add additional pages if necessary). Submit a **Letter of Commitment (SDB-3-1)** for each SDB subcontractor (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)	Associated Dollar Value of Commitment
Name: ABC IT Solutions SAP Vendor Number: 123456 SDB Verification Number: 123456-2016-09-SB-M	MBE	IT staffing resources	%	\$
Name: DGS Dually Verified Sub-Contractor SAP Vendor Number: 6 Digit Number SDB Verification Number: Obtain from SDB	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTB <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		6 %	\$60.00
Name: DGS-verified SDB Sub-Contractor SAP Vendor Number: 6 Digit Number SDB Verification Number: Obtain from SDB	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTB <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		4 %	\$40.00
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: 10%	Total \$ amount: \$100.00

## VBE-3 VBE UTILIZATION SCHEDULE

### Sample Scenario - 3% VBE Goal ; \$1,000.00 total project cost

List in the chart below VBEs (including where applicable a prime bidder or offeror is self-performing a portion of the work) that will be used to meet the VBE participation goal (add additional pages if necessary). Submit a **Letter of Commitment (VBE-3-1)** for each VBE subcontractor (add additional Letters of Commitment as necessary).

VBE Name SAP Vendor Number (6-digit number provided by VBE) VBE Verification Number (located on DGS VBE verification)	Type of VBE (check all that apply)	Description of Work to be Performed (Statement of Work/Specification reference)	% Commitment (or % of work to be self-performed by VBE bidder/offeror)	Associated Dollar Value of Commitment
Name: ABC IT Solutions SAP Vendor Number: 123456 VBE Verification Number: 123456-2016-09-SB-M	MBE	IT staffing resources	%	\$
Name: DGS Dually-verified Sub-Contractor SAP Vendor Number: 6 Digit Number VBE Verification Number: Obtain from VBE	<input type="checkbox"/> VBE <input type="checkbox"/> SDVBE		6 %	\$60.00
Name: SAP Vendor Number: VBE Verification Number:	<input type="checkbox"/> VBE <input type="checkbox"/> SDVBE		This credit may exceed the Participation Goal Percentage	%
Name: SAP Vendor Number: VBE Verification Number:	<input type="checkbox"/> VBE <input type="checkbox"/> SDVBE		%	
Name: SAP Vendor Number: VBE Verification Number:	<input type="checkbox"/> VBE <input type="checkbox"/> SDVBE		%	
Attach additional sheets if necessary			Total % VBE commitment: 6%	Total \$ amount: \$60.00

Sample Scenario: Solicitation Participation Goals  
SDB = 10% VBE = 3%  
Estimated contract value = \$1,000.00



# Dually-Verified Vendor Instructions

If a DGS-verified SDB is dually verified as a VBE, the firm will receive credit towards both the SDB participation goal and the VBE participation goal as set forth on the SDB and VBE Participation Summary Sheet. This credit may exceed the participation goal percentage, as shown in the example below.

*Example: The SDB participation goal is 10% and the VBE participation goal is 5%. A subcontractor is DGS-verified as both an SDB and a VBE and will perform 10% of the contract work. The prime contractor can satisfy both the SDB participation goal and the VBE participation goal through that dually verified subcontractor's performance of 10% of the contract work, unless otherwise agreed to by the parties in writing and approved by BDISBO and the Issuing Office.*

Based on this example, the percentage commitment indicated on SDB-3 for SDB work on this contract would be 10% and the VBE percentage commitment indicated on VBE-3 on this contract would be 10% as well. These contractual commitments meet the SDB participation goal of 10% and exceed the 5% VBE participation goal for this contract. Please note that the dually verified SDB/VBE firm only receives 10% of the contract work based on the example above.

## Newly Revised



# 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.



# Important Notes

NEW Prompt Payment Terms (non- construction) –

7/1/2023

- Bidder/Offeror shall pay SDB/VBEs, after receipt of a proper invoice and all other required documentation from an SDB/VBE, within 10 days after receipt of payment from the Commonwealth.
- Model Form SDB/VBE Subcontractor Agreement (Jaggaer 1.2.3 and 1.3.3) - 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](mailto:GS-BDISBO@pa.gov)



# The Contracted Partnership Program (CPP)

Bureau of  
Employment  
Programs

Bureau Director  
Jolene Reid



# What is the Contracted Partnership Program (CPP)?

CPP is a collaboration between the Pennsylvania Department of Human Services (DHS) and its contractors to increase the employment rate of TANF beneficiaries. TANF is the Temporary Assistance to Needy Families cash assistance program.

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

# Contracted Partnership Program



## 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.

# Contractor Partnership Program

## 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:
  - CPP hires are not specific to the work outlined in the contract
  - All positions, both in the grantee and any subgrantee, should be considered, not just positions assigned to the contract work

# Contracted Partnership Program

## 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 should include the total hiring target for the full length of the contract period.

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

# Contracted Partnership Program



## Contractor Requirements

- Submit a hiring target. The hiring target 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 by posting jobs or by connecting with Employment and Training programs to find qualified candidates.
- Effective June 2023, report all PA hires through the PA CareerLink website. This will also serve as reporting to the Department of Labor and Industries PA New Hire Report.
- Maintain communication with program office contract monitors or CPP staff on progress and challenges.

# Contractor Requirements- Additional Notes

- **Contract Specific:** The CPP requirement is contract specific, meaning each contract held with the Department may require a hiring target. If a contractor has multiple contracts with DHS, they may have multiple hiring targets.
- **Subcontractors:** Hires made by subcontractors also count towards the CPP hiring target. All hires made by the grantee and subgrantees should be used to determine the 10% hiring target. Subcontractors may also be designated to submit all hires via the PA CareerLink website
- **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

# Contracted Partnership Program



## How can DHS connect selected Offerors with TANF beneficiaries?

- Selected Offerors can post available positions via PA CareerLink® online:  
[pacareerlink.pa.gov](http://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

DHS TANF Employment and Training Programs



EARN

Work Ready

KEYS

## 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"><li>• Individualized coaching or case management</li><li>• Support to address employment barriers</li><li>• Employability skills development</li><li>• Counseling services</li><li>• Access to training programs leading to credentials</li><li>• Job placement and job search assistance</li><li>• Support services such as child care and transportation</li><li>• A minimum of one year of retention services to help navigate the transition into the workforce</li></ul>
11 Community Action Agencies	

### **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"><li>• On-site support to pursue certificates and degrees</li><li>• Help with navigating college requirements</li><li>• Assistance with financial aid and scholarship applications</li><li>• Support services such as child care, transportation, books, and supplies</li><li>• Connections to other college services such as academic advising, tutoring, student activities, and career services</li></ul>

# Contractor Partnership Program

## **What are the responsibilities of oversight staff?**

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

- Provide support to selected Offerors
- Ensure that the selected Offerors designate and maintain a point of contact for CPP purposes
- Support selected Offerors in making connections to job candidates
- Conduct outreach when selected Offerors fail to submit PA hires via PA CareerLink, no less than quarterly
- Review CPP targets during annual monitoring and targeted technical assistance visits
- Share quarterly updates with DHS leadership

# Contractor Partnership Program

## Contact Information

Contractor Partnership Program  
**Email:** [RA-BETPCPP@pa.gov](mailto:RA-BETPCPP@pa.gov)

PA CareerLink® online:  
[pacareerlink.pa.gov](http://pacareerlink.pa.gov)

- The Project Timeline includes:
  - July 29, 2024 – RFP #17-23 is Issued
  - August 8, 2024 – Pre-proposal Conference
  - August 9, 2024, 4:00:00 PM– Deadline to submit questions
  - August 23, 2024 – Answers to Potential Offerors' questions will be posted as an Addendum in JAGGAER and on the Department of General Services (DGS) website.
  - September 27, 2024, 12:00:00 PM– Due date for proposals

# Question



- All questions must be submitted in JAGGAER by the specified due date and time.

- This concludes the pre-proposal conference.
- Answers to all questions will be posted to JAGGAER and the DGS website at  
<http://www.emarketplace.state.pa.us/Search.aspx>  
by close of business August 23, 2024.

Teresa Allen  
Department of Human Services  
Bureau of Procurement & Contract Management  
Health & Welfare Building, Rm 832  
607 Forster Street  
Harrisburg, PA 17120

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