



INVITATION TO BID

#21368

For

MetroHealth Clinics Upgrades at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School

FOR THE CLEVELAND MUNICIPAL SCHOOL DISTRICT
DBA: CLEVELAND METROPOLITAN SCHOOL DISTRICT
BOARD OF EDUCATION, 1111 SUPERIOR AVENUE E, SUITE 1800
CLEVELAND, OHIO 44114

UNDER THE DIRECTION OF THE BOARD OF EDUCATION OF THE CLEVELAND METROPOLITAN SCHOOL DISTRICT -
CUYAHOGA COUNTY, OHIO

Table of Contents

Part I: ITB Submission & Process Requirements	3
Section A: Bid Submission & Format Requirements	3
Section B: Bid Constraints	4
Section C: Evaluation Process.....	6
Section D: All District Related Forms.....	6
Section E: Award of Contract	6
Part II: Overview, Background, and Specifications.....	7
Section A: Overview	7
Section B: Background.....	7
Section C: Specifications – Additional Specifications can be found in Appendix C as well as the project drawings.	7
Part III: Bid Cost Form	8
Appendix A: District Related Forms	13
Addendum Acknowledgement Form for ITB #21368	13
Certificate of Debarment.....	14
Certificate of Debarment Pg. 2.....	15
Conflict of Interest Form	16
Bidder Qualifications Form	18
Non-Collusion Affidavit.....	22
Diversity Business Enterprise Forms	23
EOA Contractual Declaration Forms.....	32
References	35
Appendix B: Service Provider Checklist	37

Part I: ITB Submission & Process Requirements

Part I of the ITB provides a detailed set of directions which the service provider will use to prepare their bid.

Schedule for posting and service provider selection for the **MetroHealth Clinics Upgrades at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School – ITB #21368.**

Step	Date*
ITB Posted	October 20, 2022
Pre-Bid Meeting(Virtual)	October 26, 2022 at 11:30 AM
All final questions from service providers to the District	November 2, 2022
Answers to service providers from the District and all addenda issued (if necessary)	November 4, 2022
ITB Responses Due	November 9, 2022
Bid Opening	November 9, 2022
Bid Award	November 18, 2022
Contract Negotiation	December 5 – December 9, 2022
Contract Start	December 16, 2022

*Dates listed are subject to change at discretion of the District. Service Providers will be notified of changes to the schedule, as appropriate.

Section A: Bid Submission & Format Requirements

Bid Submission Requirements

- a. In order for the District to evaluate bids fairly and completely, service providers should follow the format set forth herein and provide all of the information requested. The District discourages costly bids.
- b. All bids shall include all bid format requirements found below. All information requested in the district related forms must be filled in legibly and completely with blue ink signatures, or the bid may be considered non-responsive. ITB Name: MetroHealth Clinics Upgrades at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School and ITB #21368 must be on the outside of the envelope of submittals including shipping labels.
- c. Sealed Responses are due at the Cashier's Office of the Cleveland Metropolitan School District, 1111 Superior Ave E. Cleveland, Ohio 44114 on or before 1:00 PM current local time on November 9, 2022. Mailing of Bids are encouraged. However, hand deliveries will be accepted from 12:00 PM to 1:00 PM on November 9, 2022. The bids will be opened following the bid cut off time at 1111 Superior Ave. E. Cleveland, Ohio 44114 on the 19th Floor.
- d. There will be a virtual pre-bid meeting October 26, 2022 at 11:30 AM via Zoom. The Zoom link is as follows: <https://clevelandmetroschools-org.zoom.us/j/84350163250?pwd=UVJZV29rcWxOQ2pYV0pRdm8yRDRpQT09> Attendance at the pre-bid is encouraged but not mandatory. Suppliers are encouraged to submit questions prior to the Pre-Bid Meeting so they may be addressed.
- e. All submissions must include one(1) original with blue signatures, one(1) copy, and one(1) electronic bid on a USB B Flash Drive. Original Copy should be easily identifiable. Electronic bid should include all documents. Service Providers not complying with this requirement shall be notified that they have twenty-four(24) hours in which to comply with this requirement or their bid may be disqualified. This applies to copies only. All materials are submitted as is.
- f. All written questions shall be directed to the Purchasing Division via email to: Amanda.Joyce@clevelandmetroschools.org. Written questions will be accepted via email until 12:00 pm on November 2, 2022. Under no circumstances should any firm interested in providing the services identified in the ITB, their designees, or anyone affiliated with their firm, contact any other District employee or official during the ITB process, in an attempt to lobby or

influence the selection of a service provider pursuant to this ITB

- g. The District reserves the right to reject any and all proposals, to waive any and all informalities or irregularities, and to disregard all non-conforming responsive conditional proposals. Each Proposer is liable for all proposal errors or omissions. A proposer shall not be permitted to alter or amend any proposal documents after the Proposal deadline time and date detailed in the RFP unless such is formally requested, in writing, by the District.

Bid Format Requirements

- a. The MetroHealth Clinics Upgrades at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School specifications for ITB #21368 is described in Part III. Service Providers are required to provide the information below as well as complete the District Related Forms in Appendix A.
- b. Bid Responses are to include the documents as follows:
 - i. **Transmittal Cover Letter:** Prepare a letter transmitting the bid on business letterhead. The letter should identify the business name, phone number, and business web address along with the name, phone number, and email address of the key contact person. The letter must have the signature of a person with authority to obligate the business. The transmittal cover letter shall also contain a statement that the bid is a firm offer for a ninety (90) day period.
 - ii. **Bid Cost Form,** Bidders should submit a base bid for each site they wish to bid. Bidders can also submit an alternative base bid for an accelerated completion date and/or a combination bid for all three sites. The District is accepting combination bids for all three sites. Bidders wishing to submit a bid for all 3 sites should complete the combination bid line. Bidders submitting a combination bid should still clearly indicate what the cost would be for each site in the event a combination bid is not awarded. Bidders must indicate N/A for bids they are not submitting a bid for. Bids shall include a 5% contingency allowance to address concealed conditions, including evidence of State certification to perform the work required.
 - iii. **Completed District Related Forms** set forth in Appendix A of this ITB.
 - iv. **Bid Guaranty:** A Certified Check for 10% of the total amount of the bid payable to the Treasurer of the Cleveland Metropolitan School District, or satisfactory bid bond executed by the bidder or a Surety company on a form supplied by the bondsman.

Section B: Bid Constraints

- i. The service provider must comply with all laws, rules and regulations dictated by the Board of Education of the Cleveland Metropolitan School District, City of Cleveland, the State of Ohio and the United States Federal Government.
- ii. Purchases funded by federal grant funds must adhere to regulations found in Uniform Guidance "Super Circular", 2 CFR 200 (UGG), as a condition of receiving funds and to meet annual audit compliance. In an effort to keep policy for all grants consistent, the District implemented the new federal guidelines regarding procurement utilized with federal grants immediately.
- iii. The District will only accept proposals that cover all of the major components requested in the RFP.
- iv. Service provider shall not include Ohio Sales Tax in the price quoted. The District will provide tax exempt certificate to the successful Proposer.
- v. Service provider's personnel and subcontractors on the District site will be required to meet security requirements. Service provider agrees to successfully complete background checks on all of its employees, agents and subcontracts, if necessary, who provide services on site under this scope of work. Each person on site must wear an identification badge that clearly identifies and makes visible the person's name and company.
- vi. No response may be withdrawn for at least ninety(90) days after receipt of bids.
- vii. Bidder understands and agrees that subsequent to submission of the bid, any District resolution authorizing the award of a contract or agreement does not vest any contractual rights to the bidder.

- viii. Bidder understands and agrees that such District resolution operates only to encumber funds necessary for the project and does not create a binding contract.
- ix. Bidder further acknowledges and agrees that any such District resolution may be revoked, at any time prior to execution of a formal, written contract.
- x. Bidder acknowledges and agrees that it has no vested contractual right until such time as a purchase order or contract have been issued.
- xi. Bidder further acknowledges and agrees that execution of a contract and issuance of a purchase order is not a ministerial function but is a formal requirement for acceptance of a bid.
- xii. Bidder must present evidence to the District, upon request, that they are fully competent and have the necessary facilities, equipment and financial resources to perform the work required in the specifications within the time frame required.
- xiii. The District reserves the right to award the bid in whole or in parts, by item, by group of items, to a single service provider or to multiple service providers, where such action serves the best interests of the District.
- xiv. The successful Service provider and their subcontractor(s), including organizations having personnel, equipment and vehicles on District property, shall provide evidence of insurance as follows:
 - a. Commercial General Liability Including limited contractual liability
\$2,000,000.00 Limit of Liability
(Per occurrence)
 - b. Automobile Liability Including non-owned and hired
\$2,000,000.00 Limit of Liability
(Per occurrence)
 - c. Worker's Compensation Worker's compensation and employer's
insurance to full extent required by applicable
law
- xv. This requirement must be fulfilled by the successful service provider providing the District with a current Certificate of Insurance (standard ACORD form), showing the Board of Education of the Cleveland Municipal School District as an additional insured (Certificate Holder does not constitute being an additional insured), within five(5) days of Notice of Intent to Award Agreement. The certificates of insurance shall contain a provision that the policy or policies shall not be cancelled without thirty (30) days' prior written notice to the District.
- xvi. The required insurance must be provided by a company licensed by the State of Ohio, which company must be financially acceptable to the Administration of the Cleveland Municipal School District
- xvii. The District is not liable for vandalism which results in damage(s) to the property or vehicles of the Vendor. The school District will not reimburse for private insurance deductibles for such vandalism.
 - a. Vandalism damage is defined as damage resulting from criminal conduct for which an individual may (but not necessarily be processed under the Ohio Revised Code
- xviii. In submitting a bid, service providers agree, unless specifically authorized in writing by an authorized representative of the District on a case by case basis, that it shall have no right to use, and shall not use, the name of Cleveland Metropolitan School District, its officials or employees, in any advertising, publicity, promotion, nor to express or imply any endorsement of service provider's services.
- xix. The Diversity Business and Service Provider Contract Compliance Programs shall make every good faith effort to ensure that certified diversity business enterprises in the District's relevant geographic market area shall be afforded the maximum opportunity to compete for contracts, services, and purchases. The general goals for diversity business participation are: 15% for services, 20% for goods and supplies, and 30% for maintenance, construction, and repair. Non-diversity vendors will have their diversity business participation counted toward their goal attainment only with minority vendors who are certified and demonstrate previous experience in the respective business classification of the prime contractor. Only direct participation in the subcontract will be counted toward diversity business

enterprise goal attainment. Service Providers shall refer to <https://bit.ly/3wvVApK> for further information and requirements on the District's diversity goals.

Section C: Evaluation Process

- i. **Responsiveness:** Bids will be evaluated, first, as responsive or non-responsive to the Bid specifications. A preliminary review will be conducted of all bids submitted on time to ensure the bid adheres to the material submission requirements specified in the Bid. Bids that do not meet the material submission requirements may be deemed non-responsive and rejected. In the event that all bidders do not meet one or more of the material submission requirements, the District reserves the right to continue the qualitative evaluation of the bids and select the bid(s) which most closely meets the specifications in the ITB. Bids must include, or meet, the following submission requirements:
 - a. Timely Submission
 - b. Transmittal Cover Letter
 - c. Bid Cost Form
 - d. District Related Forms
 - e. Bid Guaranty
- ii. **Qualitative Evaluation** – The Bids will be evaluated to determine the lowest responsive and responsible bidder.

Section D: All District Related Forms

There are a number of REQUIRED forms in Appendix A of the ITB that must be completed and submitted with the bid response. These forms include

- a. Addendum Acknowledgement
- b. Certificate of Debarment
- c. Conflict of Interest
- d. Proposer Qualification Form
- e. Non-Collusion Affidavit
- f. DBE Forms – A, B, C, D, E, F, G, & H
- g. EOA Contractual Declaration Forms
- h. References

Section E: Award of Contract

- i. The terms of this agreement will begin immediately upon selection, approval, and contract execution through completion of the lowest responsive and responsible service provider.
- ii. The contract documents consist of the following:
 - a. District Contract
 - b. Certified Purchase Order or Supplier Contract
 - c. ITB Submission Requirements
 - d. Bid Cost Form
 - e. Bid Guaranty
 - f. All Required District Related Forms
 - g. All applicable addenda
- iii. The awarded bidder shall perform all work described in the contract documents, including without limitation, all terms and conditions of the specifications contained herein or otherwise stated in the bid documents and reasonably inferable therefrom by the bidder as necessary to produce the results intended thereby for specifications requested herein by the District.
- iv. CMSD reserves the right to reject all bids and deviate from this purchasing process to utilize other purchasing mechanisms available to the district under Ohio Law. Scope review and follow-up discussions with the apparent low bidder may be requested. CMSD reserves the right to interview or to seek additional information related to criteria already specified in the Invitation to Bid after opening the bids prior to issuance a certified Purchase Order or Supplier Contract

Part II: Overview, Background, and Specifications

Section A: Overview

The Cleveland Metropolitan School District (hereafter the “District”) under ITB #21368 is seeking service providers to build MetroHealth Clinic Upgrades at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School to the District.

All three locations shall be receiving all new flooring, wall base, interior partitions, doors, ceilings, millwork, finishes, plumbing, mechanical and electrical systems.

Section B: Background

The District is a large urban school system with over 100 instructional non-instructional sites, approximately 6,000 teachers and administrative staff, 36,000 District students, and 3,500 classrooms.

Cleveland Metropolitan School District and MetroHealth have partnered to increase access to health care and promote health and wellbeing to our youth. The program and associated new clinical spaces will support the Whole Child Framework/Model- through offering health services not only to students, but also those that support the youth in schools (staff and family members). Our architectural efforts have focused on specific areas within three (3) existing educational buildings within the District: Glenville High School, Mound K~8 School and Clara E. Westropp K~8 School

Section C: Specifications – Additional Specifications can be found in Appendix C as well as the project drawings.

i. **Glenville High School**

Two original Classrooms Nos. 108 & 109 and an original Teacher’s Work Room No. 107 are now being combined totaling 1,800 SF. The area is located in the northwest corner of the First Floor- adjacent to an existing egress stair. The objective is to create a New Entrance and Exit (internal), New Reception and Waiting Areas, New Intake/Triage Area, Three (3) New Clinical Exam Rooms, New Staff Workroom, New Unisex Toilet Room, New Testing and Medical Lab, New Staff Breakroom and a New Storage/Supply Closet.

ii. **Mound K-8 School**

The existing 566 SF Special Education Classroom No. 155 for Grades K~2 will be transformed into the New CMSD/MetroHealth Clinic. The area is located on the north side of the First Floor accessible via Corridor No. 173. The objective is to create a New Intake/Triage Area, Two (2) Clinical Exam Rooms and New Staff Work areas.

iii. **Clara E. Westropp K-8 School**

The existing Clinic and adjacent small connecting corridor will be renovated into the the New 1,280 SF CMSD/MetroHealth Clinic. The area is centrally located between two east-west running corridors and near the Gymnasium/Auditorium on the First Floor. The objective is to create New Reception and Waiting Areas, New Intake/Triage Areas, Modernize the existing Two (2) Exam Rooms, New Staff Work Area, Modernize the existing Two (2) Unisex Toilet Rooms and New Secured Medical Storage/Supply Closets.

iv. **Work Hours**

The Clara Westropp, Mound and Glenville schools are occupied sites. Therefore, disciplines that would be disruptive to learning must move to weekend and second shift.

Running cable, electrical, installation of lights, plumbing, painting, installation of ceiling tiles and floor tiles could be completed during the school day as long as it does not disrupt learning.

Part III: Bid Cost Form

ITB #21368 for MetroHealth Clinic Upgrades at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School.

The Bidder proposes to furnish all labor, materials, and equipment necessary to complete the ITB 21368. The undersigned proposes to complete the upgrades to the MetroHealth Clinics at Clara Westropp PreK-8, Mound PreK-8, and Glenville High School for Cleveland Metropolitan School District in accordance with the Specifications and to the entire satisfaction of, and acceptance by, the District and for the following prices. The Agreement will begin **December 16, 2022** pending authorization of funds at the discretion of the District.

Bidders should submit a base bid for each site they wish to bid. Bidders can also submit an alternative base bid for an accelerated completion date and/or a combination bid for all three sites.

Base Bid: Unless otherwise noted, all work indicated on the drawings and/or described in this project manual for Base Bid. The work includes, but is not limited to selective demolition, general trades, electrical, mechanical, plumbing, fire protection, and technology. Base Bid shall also include, removal and disposal of all temporary plywood covering of exterior windows and doors, and temporary security chain link fencing and posts around the building/site.

Alternate Base Bid – Accelerated Completion Date: Bidder shall include a detail estimate of premium charges necessary to complete this work at an accelerated completion date.

Combination Bid: The District is accepting combination bids for all three sites(line 4). Bidders wishing to submit a bid for all 3 sites should complete the combination bid line. Bidders submitting a combination bid should still clearly indicate what the cost would be for each site in the event a combination bid is not awarded.

Bidders must indicate N/A for bids they are not submitting a bid for.

Bids shall include a 5% contingency allowance to address concealed conditions.

Site	Base Bid				Alternate Base Bid - Accelerated Completion Date			
	Materials Cost	Labor Cost	5% Contingency Allowance	Total Sum	Materials Cost	Labor Cost	5% Contingency Allowance	Total Sum
Clara Westropp PreK-8 School								
Mound PreK-8 School								
Glenville High School								
Combination Bid (All three sites)								

The Architect’s opinion of probable cost of construction, for base bid is \$350,000 for Clara Westropp PreK-8 School, \$150,000 for Mound PreK-8 School and \$700,000 for Glenville High School.

Clara Westropp PreK-8 School Schedule & Substitutions

Schedule:

Date to Begin Construction:

Event:	Date:

Substitutions: Bidder is to list here any “Substitutions” for which consideration is desired, showing the addition or reduction in price to be made, for each, if the substitution is accepted, or stated “No Change in Price”, if none is provided. Submission of proposed substitution for approval, whether for savings in cost or improvement in construction is encouraged.

Substitutions are for consideration of inclusion only. The District has the right to require all work to conform to the Specifications issued.

Branded or Make Specified	Proposed Substitutions	Add	Deduct

Mound PreK-8 School Schedule & Substitutions

Schedule:

Date to Begin Construction:

Event:	Date:

Substitutions: Bidder is to list here any “Substitutions” for which consideration is desired, showing the addition or reduction in price to be made, for each, if the substitution is accepted, or stated “No Change in Price”, if none is provided. Submission of proposed substitution for approval, whether for savings in cost or improvement in construction is encouraged.

Substitutions are for consideration of inclusion only. The District has the right to require all work to conform to the Specifications issued.

Branded or Make Specified	Proposed Substitutions	Add	Deduct

Glenville High School Schedule & Substitutions

Schedule:

Date to Begin Construction:

Event:	Date:

Substitutions: Bidder is to list here any “Substitutions” for which consideration is desired, showing the addition or reduction in price to be made, for each, if the substitution is accepted, or stated “No Change in Price”, if none is provided. Submission of proposed substitution for approval, whether for savings in cost or improvement in construction is encouraged.

Substitutions are for consideration of inclusion only. The District has the right to require all work to conform to the Specifications issued.

Branded or Make Specified	Proposed Substitutions	Add	Deduct

Signatory: Vendors are required to complete the signatory section below.

Company Name: _____

Address: _____

City, State, Zip Code: _____

Telephone Number: _____ Fax Number: _____

Email Address: _____

Signature: _____

Printed Name: _____

Date: _____

Appendix A: District Related Forms
Addendum Acknowledgement Form for ITB #21368

Having read and examined the Request for Proposal Documents, including the specifications, prepared by the Cleveland Metropolitan School District for the above-referenced Project, and the following Addenda:

Addendum Number	Date of Receipt
_____	_____
_____	_____
_____	_____
_____	_____

Bidder: _____.

The undersigned Vendor proposes to perform all work for the applicable contract, in accordance with the contract document for the proposed sums.

Failing to acknowledge a published Addendum may cause your bid to be rejected.

Signature: _____ Date: _____

Certificate of Debarment



Certification Regarding Debarment, Suspension, and Other Responsibility Matters Primary Covered Transactions

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 13 CFR Part 145. The regulations were published as Part VII of the May 26, 1988 *Federal Register* (pages 19160-19211). Copies of the regulations are available from local offices of the U.S. Small Business Administration.

(BEFORE COMPLETING CERTIFICATION, READ INSTRUCTIONS ON REVERSE)

- (1) The prospective primary participant certifies to the best of its knowledge and belief that it and its principals:
 - (a) Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
 - (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
 - (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default.
- (2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective primary participant shall attach an explanation to this proposal.

Business Name _____

Date _____

By _____

Name and Title of Authorized Representative

Signature of Authorized Representative



Certificate of Debarment Pg. 2

- 2 -

INSTRUCTIONS FOR CERTIFICATION

1. By signing and submitting this proposal, the prospective primary participant is providing the certification set out below.
2. The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective participant shall submit an explanation of why it cannot provide the certification set out below. The certification or explanation will be considered in connection with the department or agency's determination whether to enter into this transaction. However, failure of the prospective primary participant to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
3. The certification in this clause is a material representation of fact upon which reliance was placed when the department or agency determined to enter into this transaction. If it is later determined that the prospective primary participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.
4. The prospective primary participant shall provide immediate written notice to the department or agency to which this proposal is submitted if at any time the prospective primary participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
5. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549. You may contact the department or agency to which this proposal is submitted for assistance in obtaining a copy of those regulations (13 CFR Part 145).
6. The prospective primary participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency entering into this transaction.
7. The prospective primary participant further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion--Lower Tier Covered Transactions," provided by the department or agency entering into this covered transaction, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
8. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the ineligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.
9. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
10. Except for transactions authorized under paragraph 6 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.

Conflict of Interest Form

Statement of Potential Conflicts of Interest

Vendor Name:	Primary Contact:
Address 1:	Telephone #:
Address 2:	Fax #:
City:	Email:
State, Zip:	Website:

Cleveland Metropolitan School District (CMSD) adheres to Ohio Ethics Law and strictly follows the opinion of the Ohio Ethics Commission. As such, each vendor is requested to submit this statement declaring any potential conflicts of interest in doing business with the District. Please answer the following two questions providing all requested information.

1. Are any current Cleveland Metropolitan School District (CMSD) employees, Cleveland Board of Education members, or any of their immediate family members, also members of the vendor's board of directors, hold any officer position with the vendor, or own any shares of any stock issued by the vendor?

Yes _____ No _____

If **Yes**, and if the CMSD employee, CMSD board member, or immediately family member is a member of the vendor's board of directors or holds an office with the vendor, please state the person's name and position with the vendor.

Name: _____

Position: _____

If **Yes**, and if the CMSD employee, CMSD board member, or immediate family member owns share of any stock in the vendor organization or company, state the percentage of all outstanding company shares owned by the CMSD employee or board member.

_____ %

2. Are any current CMSD employees, CMSD board members, or any immediate family members also employees of the vendor?

Yes _____ No _____

If **Yes**, please state the person's name and provide a description of their job duties for the provider:

Name: _____

Job Duties: _____

If **Yes**, please describe the contact that the vendor will have with the CMSD employee or CMSD board member in the course of providing services to the District:

CERTIFICATION

I do hereby certify that the foregoing statements are true and accurate, and that my signature below attests to the authenticity of my identity as the person actually signing this form. This document is not a contract. In order for a binding Agreement to exist, a signed Agreement will be required prior to any legally binding commitment by the District.

NOTARIZED STATEMENT

_____ being duly sworn and deposes says

That he/she is the _____ of
(title)

_____, and answers to all the
(organization)

foregoing questions and all statements therein contained are true and correct.

(signature)

Subscribed and sworn before me this ____ day of _____, 20____

Notary Public: _____

My commission expires: _____

Bidder Qualifications Form

Bidder must answer all questions or attach a written explanation for each question.

PROPOSER NAME: _____

ADDRESS: _____

CITY; STATE: _____ ZIP: _____

CONTACT PERSON: _____

TITLE: _____

TELEPHONE: () _____ TOLL FREE: () _____

TAXPAYER IDENTIFICATION NUMBER: _____

1. What type of organization? (i.e. corporation, partnership, etc.)

2. How many years has your organization been in business?

3. How many years has your organization been in business under its current name?

4. List any other aliases your organization has utilized in the last two years and the form of Business

5. If you are currently a corporation, list the following:
 - a. State of incorporation

 - b. Date of incorporation

 - c. President's name

 - d. Secretary's name

 - e. Treasurer's name

 - f. Statutory agent's name

 - g. Name of shareholders, if less than 10

 - h. Principal place of doing business

6. If you are currently in a partnership, list the following:
 - a. Name and address of all general and limited partners.

 - b. Original name and date of organization's inception

7. If you are neither a corporation nor a partnership, please describe your organization and list principals.

8. Are you legally qualified to do business in the State of Ohio?

9. Are you legally qualified to do business in Cuyahoga County and licensed by the City of Cleveland?

10. Has your organization ever been (i) declared by a customer to be in default under a contract and/or (ii) sued by a customer for failure to completely a contract or properly perform services in a timely manner? If yes, please state where, when, and why.

11. Has your organization ever been cited by a local, county, state, or federal authority for violation of a regulation or statute or failing to timely complete a contract in accordance with specifications? If yes, please state date, agency, and final disposition.

12. Has your organization ever filed for bankruptcy? If yes, please state where, when and why?

13. On a separate sheet, list the major customers for whom your organization has provided this type of equipment or service in the past five years. Include owner's name and type of work performed.

14. Has your organization ever been sued by a supplier for failure to timely pay for materials or equipment provided? If yes, please provide details.

15. What is the dollar limit of your firm's General (CLS) Liability Insurance?

Name of insuring company: _____

Policy number: _____

16. What is the dollar limit of your firm's Automotive Liability Insurance?

Owned vehicles _____

Non-Owned vehicles _____

Name of insuring company_____

Policy number_____

17. List the name and address of every person having an interest in this ITB.

18. Has any federal, state or local government entity ever cited or taken any action against your organization or any of its principals for failure to pay or remit any taxes including but not limited to income, withholding, sales, franchise, or personal property taxes? If yes, please give name of agency, date and amount of taxes overdue and resolution of the issue.

19. Is your organization and its' principals current in payment of personal property taxes?

20. The prospective lower tier participant certifies, by submission of this ITB, that neither it nor its principals is presently debarred, suspended, proposed, for debarment or suspension, declared ineligible, or voluntarily excluded from participation in this transaction by any State and/or Federal Department or Agency.

21. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participants shall attach an explanation to this ITB.

Notarized Statement

_____ being duly sworn and deposes says

that he/she is the _____ of
(title)

_____, and answers to all the
(organization)

foregoing questions and all statements therein contained are true and correct.

(signature)

Subscribed and sworn before me this _____ day of _____, 20____

Notary Public: _____

My commission expires: _____

Non-Collusion Affidavit

This Affidavit must be executed and shall accompany the proposal in order for the proposal to be considered.

NON-COLLUSION AFFIDAVIT
State of Ohio, Cuyahoga County

_____, being first duly sworn, deposes and says that

he/she is _____ of _____

of the party making the foregoing proposal; that such proposal is genuine and not collusive or sham; that said proposer has not colluded, conspired, connived, or agreed, directly or indirectly, with any proposer or person, to put in a sham proposal, or that such other person shall refrain from proposing, and has not in any manner, directly or indirectly sought by agreement or collusion, or communication or conference, with any person, to fix the proposal price of affiant or any other proposer, to fix any overhead, profit or cost element of said proposal price, or of that of any proposer, or to secure any advantage against the Board of Education of the Cleveland Metropolitan School District, or any person or persons interested in the proposal; and that all statements contained in said proposal are true; and further that such proposer has not, directly or indirectly, submitted this proposal, or the contents thereof, or divulged information or data relative thereto to any Association or to any member or agent thereof.

Affiant

Sworn to and subscribed before me this ____ day of _____, 20__.

Notary Public in and for Cuyahoga County, Ohio

My commission expires: _____

Diversity Business Enterprise Forms

Information about the District's Diversity Business Enterprise Program can be found at <https://bit.ly/3wvVApK>.

DBE Form A

Name of Firm: _____

Address: _____

City, State, Zip Code: _____

Telephone Number: _____

Type of Business (Product or Service): _____

Date of Proposed Contract Award: _____

Amount of Proposed Contract Award: _____

Diversity Business Enterprise Subcontractor(s):

Dollar Amount Subcontract Award: _____

Percent of Subcontract Award: _____

D.B.E. Participation: _____ \$ _____

F.B.E. Participation: _____ \$ _____

Name of EEO Officer: _____

(Signature of owner, partner, or authorized officer)

Name: _____ Dated: _____
(printed)

Title: _____

DO NOT COMPLETE BELOW THIS LINE

___ Compliant ___ Compliance Pending ___ Non-Compliant

Compliance Date: _____

(signature, DBE Department)

(date)

DBE Form B

NOTICE OF REQUIREMENT TO ENSURE DIVERSITY BUSINESS ENTERPRISE (DBE) OPPORTUNITY

Note: All eligible proposers for award of the contract should comply with the Requirements, Terms, and Conditions of this Notice.

The undersigned proposer hereby agrees that the goal it has established for DBE participation in this project through either subcontracting or entering into a joint Venture with DBEs in conformity with the Requirements. Terms and Conditions of this Notice is a goal of thirty (30%) percent for a construction/repair/ maintenance contract, twenty (20%) percent for a supply contract, and fifteen (15%) for a service contract of the total contract amount of this project. In no event will the absence of goals as stated above be deemed as compliance with the requirements, terms and conditions of this notice.

In addition, the undersigned will complete and attach hereto the DBE (Form C) Schedule for DBE participation, showing all DBE/FBE that will participate as subcontractors or joint ventures in this contract and a DBE (Form D), DBE Letter of Intent form for each DBE/FBE listed on the Schedule.

Proposer: _____

Date: _____

By: _____

Title: _____

Definition of DBE: A Diversity Business Enterprise (DBE)

"Small Diversity business concern" means a small business concern that is a least (51) percent unconditionally owned by one or more individuals who are both socially and economically diverse, or a publicly owned business that has at least (51) percent of its stock unconditionally owned by one or more socially and economically diverse individuals and that has its management and daily business controlled by one or more such individuals. This term also means a small business concern that is at least (51) percent unconditionally owned by an economically diverse Indian tribe or Native Hawaiian Organization, or a publicly owned business that has least (51) percent of its stock unconditionally owned by one of these entities, that has its management and daily business controlled by members of an economically diverse Indian tribe or Native Hawaiian Organization.

DBE Form C

SCHEDULE MBE/FBE PARTICIPATION

Project Name: _____

Name of Non-DBE Contractor: _____

Identification Number: _____

Location: _____

Name of Minority Contractor: _____

Address: _____

City, State, Zip: _____

Type of work to be performed and work hours involved:

Projected commencement and completion dates for work:

Agreed price in dollars or percentage:

The undersigned will enter into a formal agreement with DBE for work listed in this schedule conditioned upon execution for a contract with the Cleveland Municipal School District

TO BE RETURNED WITH THE PROPOSAL

Signature of Non-DBE Prime Contractor

Date: _____

DBE Form D

DBE LETTER OF INTENT

To: _____
Non-DBE Prime or General Proposer

Project: _____

NON-DBE PRIME OR GENERAL PROPOSER

The Undersigned intends to perform work in connection with the above-referenced project as (check one):

an individual a corporation a partnership a joint venture

DBE status of the undersigned is confirmed in the Cleveland Municipal School District's DBE file of bona fide enterprises with a certification date of: _____

The Undersigned is prepared to perform the following described work in connection with the above referenced project. Specify in detail particular work items or parts thereof to be performed:

at the following price or percent of contract: \$ _____

You have projected the following commencement date of such work, and the undersigned is projecting completion of such work as follows:

Items _____

Projected Commencement Date _____

Projected Completion Date _____

_____ % (percent) of the dollar value of the subcontract will be sublet and/or awarded to NON-DBE contractor (s) and/or NON-FBE SUPPLIERS. The undersigned will enter into a formal agreement for the above work with you conditioned upon your execution of a contract with the Cleveland Municipal School District.

Date

Name of DBE Firm (where applicable)

Signature of DBE (where applicable)

Signature of MBE Firm

(TO BE RETURNED WITH ITB)

Name of FBE Firm

Signature of FBE Firm

DBE Form E

DBE Unavailability Certification

I, _____, _____
Name Title

Of _____, certify that on _____
Date

I contacted the following DBE to obtain a Proposal for work items to be performed on:

Board Project: _____

Minority Contractor: _____

Work Items Sought: _____

Form of Proposal Sought: _____

Female Contractor: _____

Work Items Sought: _____

Form of Proposal Sought: _____

To the best of my knowledge and belief said minority business enterprise was unavailable (exclusive of the unavailability due to lack of agreement on price) for work on this project or unable to prepare a proposal for the following reason (s):

Signature, Non-DBE prime Proposer Date

_____ was offered an opportunity to proposal on the above-referenced work on
_____ by _____
Date Non-DBE Prime Proposer

Signature, Non-DBE Prime Proposer

The above statement is a true and accurate account of why I did not submit a Proposal on this project.

Signature, Non-DBE prime Proposer

DBE Form F

Non-Minority Prime Affidavit For DBE

STATE OF }
COUNTY OF } SS.

AFFIDAVIT

The undersigned swear that the foregoing statements are correct and include all material information necessary to identify and explain the items and operation of our subcontract and the intended participation by each party in the undertaking. Further, the undersigned covenant and agree to provide to the Cleveland Municipal School District current, complete, and accurate information regarding actual subcontract work and the payments thereof, and any proposed changes in any of the subcontract arrangements and to permit the audit and examination of the books, records and files of the subcontract or those of each party relevant to the subcontract, by authorized representatives of the Cleveland Municipal School District. Any material misrepresentation will be grounds for terminating any contract which may be awarded and for initiating action under federal and state laws concerning false statements.

Name of Firm: _____

Signature: _____

Name and Title: _____

Date: _____

STATE OF }
COUNTY OF } SS.

On this _____ day of _____ 20____, before me appeared _____

_____, to me personally known, who being duly sworn,

did execute the foregoing affidavit, and did state that they were properly authorized by _____

_____ to execute the affidavit and did so as their free act and deed.

(Seal)

Notary Public _____

Commission expires _____

DBE Form G

This form need not be completed if all joint venture firms are diversity business enterprises

1. Name of Joint Venture: _____

2. Address of Joint Venture: _____

3. Phone Number of Joint Venture: _____

4. Identify the firms which comprise this joint venture. (The DBE partner must complete DBE Form A or have current DBE Certification)

a. Describe the roll of the DBE firm in the joint venture: _____

b. Describe briefly the experience and business qualifications of each non-DBE Joint Venture: _____

5. Nature of Joint Venture's Business: _____

6. Provide a copy of the Joint Venture Agreement.

7. What is the percentage of DBE Ownership? DBE _____% FBE _____%

8. Ownership of Joint Venture: (This need not be completed if described in the Joint Venture agreement provided in response to question 6).

a. Profit and loss sharing: _____

b. Capital contributions, including equipment: _____

c. Other applicable ownership interest: _____

9. Control of and participation in this contract. Identify by name, race, and "firm" those individuals and their titles who are responsible for day-to-day management and policy decision making, including, but not limited to, those prime responsibility form:

a. Financial decisions: _____

b. Management decisions, such as:

i. Estimating: _____

ii. Marketing and Sales: _____

iii. Hiring and firing of management personnel: _____

iv. Purchasing of major items or supplies: _____

c. Supervision of field operations: _____

Note: If after complete the DBE Form B and before the completion of the joint venture's work on any contract awarded, there is any significant change in the information submitted, the joint venture must inform the Cleveland Municipal School District, either directly or through the non-DBE prime subcontractor if the joint vendor is a subcontractor.

DBE Form H

Non-Minority Prime Affidavit (Joint Venture)

STATE OF OHIO

CUYAHOGA COUNTY

AFFIDAVIT

The undersigned swear that the forgoing statements are correct and include all material information necessary to identify and explain the items and operation of our subcontract and the intended participation by each joint venture in the undertaking. Further, the undersigned covenant and agree to provide to the Cleveland Municipal School District current, complete, and accurate information regarding actual joint venture work and the payments thereof and any proposed changes in any of the subcontract arrangements and to permit the audit and examination of the books, records and files of the joint venture or those of each party relevant to the joint venture, by authorized representatives of the Cleveland Municipal School District. Any material misrepresentation will be grounds for terminating any contract which may be awarded and for initiating action under federal and state laws concerning false statements.

Name of Firm (Prime)

Name of Firm (DBE)

Signature

Signature

Name and Title

Name and Title

Date

Date

STATE OF

] COUNTY OF

]SS.

On this _____ day of _____ 20 __ , before me appeared _____, to me personally known, who being duly sworn, did execute the foregoing affidavit, and did state that they were properly authorized by _____ to execute the affidavit and did so as their free act and deed.

(Seal)

Notary Public

Commission expires

EOA Contractual Declaration Forms

Information about the District's Affirmative Action Program can be found at <https://bit.ly/3wvVApK>.

Service Provider Contract Compliance Form

Name of Firm: _____

Address: _____

City, State, Zip Code: _____

Telephone Number: _____

Standard Metropolitan Statistical Area: _____

Recruitment Area: _____

Type of Business (product or service): _____

Name of EEO Officer: _____

Signature of Owner, Partner, or Authorized Officer: _____

Name (type or print): _____

Date: _____ Title: _____

Do not complete below this line

Status of Vendor:

Compliance

Conditional Compliance

Non-Compliance

Compliance Pending

Comments: _____

Date: _____ Signature: _____

Compliance Declaration

The following must be filled out completely:

It is the policy of _____ that equal employment opportunity be afforded to all qualified persons without regard to race, religion, color, sex, national origin, age, or handicap.

In support of this policy, _____ will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, or handicap.

_____ will take affirmative action to insure that applicants are employed and that employees are treated during employment without regard to race, color, sex, national origin, age, or handicap. Such action will include, but not be limited to:

Recruitment, advertising, or solicitation for employment, hiring, placement, upgrading, transfer or demotion, selection for training including apprenticeship rates of pay or other forms of compensation, layoffs or termination.

The undersigned company states that they are of current applicable requirement pertaining to Fair Labor Standards and Non-Discriminatory Practices of Federal, State, and Local Governments.

The undersigned further acknowledges that if the contract is awarded to the undersigned, that the undersigned will comply with all Fair Labor Standard Practice.

(Name of Company)

_____ Date: _____

(Signature of Company Official)

STATE OF ()
COUNTY OF () SS.

BEFORE ME, a Notary Public in and for said County and State personally appeared the above-named Company _____ by _____

It's _____, who acknowledged that they knowingly signed the aforesaid instrument, and that the same is their free act and deed duly authorized and the free act and deed of said company.

IN TESTIMONY WHEREOF, I have hereto set my hand and affixed seal at

_____, _____, this

day of _____, 20__.

Employment Data Form

Please note this data may be obtained by visual survey or post-employment record. Neither visual surveys nor post-employment records are prohibited by any federal, state or local law. All specified data is required to be filled in by District policy.

Job Categories	All EMPLOYEES			MALES					FEMALES				
	TOALS MALES & FEMALES	MALES	FEMALES	WHITE (NOT OF HISPANIC ORIGIN)	BLACK (NOT OF HISPANIC ORIGIN)	ASIAN AMERICAN OR PACIFIC ISLANDER	AMERICAN INDIAN OR ALSKAN NATIVE	HISPANIC	WHITE (NOT OF HISPANIC ORIGIN)	BLACK (NOT OF HISPANIC ORIGIN)	ASIAN AMERICAN OR PACIFIC ISLANDE	AMERICAN INDIAN OR ALSKAN NATIVE	HISPANIC
OFFICIALS, MGRS & SUPERVISORS													
PROFESSIONALS													
TECHNICIANS													
SALES WORKERS													
OFFICE/CLERICAL													
CRAFTWORKERS (SKILLED)													
OPERATIONS (SEMI-SKILLED)													
LABORERS (UNSKILLED)													
SERVICE WORKERS													
APPRENTICES													
TOTAL													

Additional information (optional):

Describe any other actions taken which show that all employees are recruited, hired, or trained or promoted without regard to their race, religion, color, sex, handicap, age or national origin. Use second sheet if additional space is needed:

The undersigned certifies that they are legally authorized by the proposer to make the statements and representations contained in this report, and that they have red all of the foregoing statements and representations which are true and correct to the best of their knowledge and belief.

FIRM OR CORPORATE NAME: _____

DATE: _____

SIGNATURE: _____

TITLE: _____

References

Include below three references of equal or larger size to this current ITB project. Public sector experience is preferred, but not required. Please attach relevant supporting documentation, such as project plans, scope of work.

Reference #1:

Company/School Name: _____

Address: _____

Type of Business: _____

Contact Person: _____

Telephone and Fax#: _____

Dates of Service: _____

Description of Services Provided: _____

Reference #2:

Company/School Name: _____

Address: _____

Type of Business: _____

Contact Person: _____

Telephone and Fax #: _____

Dates of Service: _____

Description of Services Provided: _____

Reference #3:

Company/School Name: _____

Address: _____

Type of Business: _____

Contact Person: _____

Telephone and Fax#: _____

Dates of Service: _____

Description of Services Provided: _____

Appendix B: Service Provider Checklist

To assist service providers in the preparation of their proposals to ensure compliance with all document requirements

- Cover Page
- Transmittal Cover Letter, signed
- Table of Contents
- Bid Cost Form
 - Signatory
- District Related Forms
 - Addendum Acknowledgement, checked: <https://www.clevelandmetroschools.org/purchasing> for any addendums
 - Certificate of Debarment
 - Conflict of Interest
 - Bidder Qualification Form
 - Non-Collusion Affidavit
 - DBE Forms- A, B, C, D, E, F, G, & H, for more information: <https://bit.ly/3wvVApK>
 - EOA Contractual Declaration Forms 1 &2, for more information: <https://bit.ly/3wvVApK>
 - Employment Data Form
 - References
- Bid Guaranty

Copies

- Original, marked
- Copies (1), marked
- USB B/Flashdrive