



REQUEST FOR PROPOSAL

#21347

For

Comprehensive Student Support Services
(Nursing, Psychological, and Speech & Language Pathology Services)

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 AUXILIARY SERVICES AND SPECIAL EDUCATION DIVISIONS OF THE BOARD OF
EDUCATION OF THE CLEVELAND METROPOLITAN SCHOOL DISTRICT - CUYAHOGA COUNTY, OHIO

CLEVELAND MUNICIPAL SCHOOL DISTRICT
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NOTICE OF REQUEST FOR PROPOSAL #21347

Separate sealed proposals for the requirement set forth below will be received in the Cashier's Office of the Cleveland Metropolitan School District located at 1111 Superior Avenue E, Cleveland, Ohio 44114, until **1:00 pm current local time on June 20, 2022**. **Mailing of RFP responses is encouraged. However, hand deliveries will be accepted only from 12:00 PM to 1:00 PM on June 20, 2022.** This RFP will not be publicly opened.

Comprehensive Student Support Services
(Nursing, Psychological, and Speech & Language Pathology Services)

Copies of Scope of Work, Requirements, and related Appendix may be obtained directly from the District's Webpage. Go to clevelandmetroschools.org/purchasing and click on the RFP number. If you require assistance, please email amanda.joyce@clevelandmetroschools.org.

There will be a virtual pre-proposal meeting **May 25, 2022 at 11:00 AM** via Zoom. The Zoom link is as follows:

<https://clevelandmetroschools.org.zoom.us/meeting/register/tZYoceGopjgtGdM49UpYA7d6tOlc2KPBEViW>

Attendance at the pre-proposal meeting is encouraged but not mandatory.

All questions and correspondence related to this RFP must be submitted in writing by **12:00 pm on May 26, 2022** at the email address given above. Answers to corresponding questions will be provided directly to those submitting the question, and a comprehensive question and answer list will also be posted at clevelandmetroschools.org/purchasing. Any errors and/or omissions reported will be addressed via Addenda. Addenda will be issued no later than **June 10, 2022**.

No proposal may be withdrawn for at least ninety (90) days after the deadline for submittal.

The Cleveland Metropolitan School 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.

The Cleveland Metropolitan School District does not discriminate in educational programs, activities or employment on the basis of race, color, national origin, sex, age, religion or disability.

The new Uniform Grant Guidance, 2 CFR200 (UGG) went into effect for Cleveland Metropolitan School District (CMSD) on July 1, 2018 and will apply to awards or funding increments issued on or after this date. 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, CMSD implemented the new federal guidelines regarding procurement utilized with federal grants immediately.

Proposers on this work shall be required to comply with all applicable requirements pertaining to fair labor, state and local government.

M. Angela Foraker
Executive Director, Financial Strategy, Sourcing & Supports
May 16, 2022

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Part 1: INTRODUCTION, BACKGROUND & SCOPE OF WORK

Section A: Introduction

The Cleveland Metropolitan School District (hereafter the “District”) under RFP #21347 is seeking service providers to provide Comprehensive Student Support Services for eligible students of the District including: Nursing , Speech and Language Pathology , and Psychological Services. To facilitate submission and evaluation of proposals, the following provides relevant background information, scope of work requirements, and instructions for services providers to submit their proposal responses to this RFP. Service providers may submit a proposal including one or any combination of the scopes of work outlined below.

Section B: Background

The District is a large urban school system with over 100 instructional and non-instructional sites, approximately 6,000 teachers and administrative staff, 36,000 District students, and 3,500 classrooms. The District provides an appropriate education for all students identified as having special needs pursuant to the Individuals with Disabilities Education Act (IDEA) for the District’s schools as well as Cleveland’s non-public schools. Some special education students require Nursing services as part of their individual education program (IEP) as well as some students covered under Section 504.

Additionally CMSD manages Auxiliary Services funds on behalf of 26 non-public schools and under Ohio law, Auxiliary Services funds paid to school districts or chartered nonpublic schools shall be used for prescribed purposes, including the provision of psychological, speech, and pathology services as outlined in section C. The specific non-public schools requesting services are identified in those sections.

Section C: Scope of Work & Requirements

i. Nursing Services – Performance Requirements/Specifications

- a. Agencies that provide the services of a Licensed Practical Nurse or State Tested Nurse Aide will provide appropriate supervision by a Registered Nurse. Agencies will provide nurses who are licensed for the specific duties assigned.
- b. Providing direct nursing services to assigned students, based on the individual student’s educational need, health care plan and physician’s orders.
- c. Providing medical treatments to assigned student(s), based on the individual student educational need, healthcare plan and physician’s orders.
- d. Attending parent conferences and or individual education plan meetings, if invited, to contribute to the educational program of the assigned students.
- e. Complete required documentation including online Medicaid billing as required by the District
- f. Nurses must be available to accompany student on the school bus to and from school.
- g. Service Provider must address all aspects of the above stated performance requirements.
- h. Service Provider must include the maximum number of hours of nursing services that could be provided per week.

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- i. Service Provider must clearly state the **cost per hour** of services delivered. The District does NOT reimburse for mileage in addition to cost/hour rate. Proposals must clearly state other financial considerations that may be incurred in addition to the hourly rate including the cost of Lead Nurse.
- j. Service Provider must include L.P.N. and STNA licensure status, and the agency's Federal ID Number, where applicable.
- k. Service Provider must specify any services or supplies to be provided by the District (egg: training, testing, materials, equipment).
- l. Special Requirements Regarding Criminal Background
 - i. Criminal Background Investigations of individuals working on school property
 - 1. At a minimum, a service provider shall obtain a complete BCI criminal background investigation for all employees who will work on a site. In the event that the service provider is from out of state, the criminal background investigation shall be broadened to include their home state, as well as the state of Ohio as outlined above. The company providing such information must be recognized by local law enforcement agency as qualified to do so. All costs associated with these criminal background checks is the responsibility of the service provider.
 - 2. Any individual with the following criminal convictions or pending charges will NOT be permitted on any school property
 - a. Child Molestation or Abuse or indecent liberties with a child;
 - b. Rape;
 - c. Any Sexually Oriented Crime;
 - d. Drugs: Felony use, possession or distribution;
 - e. Murder, manslaughter or other death related charge; or
 - f. Assault with a deadly weapon or assault with intent to kill.
 - 3. Any individual with a prior conviction or pending charges contained in the aforementioned list, shall be banned (not allowed) from any school property. The District, may, at any time, request verification of criminal background investigation for any service provider on school property.
- m. The winning proposer will be responsible for SERS/STRS contributions for contracted nurses at the District.
- n. Invoices will be paid upon services being rendered which includes completion of Medicaid documentation in the designated system and providing copies of daily nursing notes.

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ii. Psychological Services – Performance Requirements/Specifications

- a. The successful proposer will be required to provide a staff of approximately **14**. The number of staff may change annually based on the Final Needs Assessment; and will be provided prior to the start of the next upcoming school year. ODE or OH State Board Licensed Psychologists. Only one psychologist is to be assigned to each school to ensure continuity of services on an ongoing basis. Psychologist must render services during school hours and in accordance with the nonpublic schools' schedules. The District reserves the right to request additional FTE's during the term of the RFP.
- b. The rate of service is based per site according to the schedule.
- c. Proposer must submit with the proposal a listing of the personnel who will provide the services for each school including their certification, credentials and/or licenses to perform services as a licensed Psychologist. Include their level of experience as a licensed Psychologist. List should identify supervisory personnel responsible for monitoring and evaluating personnel. No Psychologist with an evaluation lower than average shall be included in the assignment list.
- d. The successful service provider agrees to complete a criminal background check and drug screening on any of its employees who provide services in the school district under the agreement and who are required by Ohio Revised Code Section 3319.39, 3319.31 or 3319.392 as amended. A copy of all such background checks shall be provided by the successful service provider to the District at the service provider's expense
- e. Services are to be provided by Licensed Psychologists only and relate to the needs of a diverse student population.
- f. Develop a schedule based on contracted days and provide the schedule to the Nonpublic School Principals, the District's Psychological Services and Auxiliary Services.
- g. Services must be provided in compliance with local, state and federal regulations and meet the requirements of the non-public schools making the requests.
- h. Consultation and collaboration with the District's School Psychologists and/or Nonpublic Coordinator regarding the child find process for students suspected of having educational disabilities. This includes obtaining consent for information sharing, dissemination and collection of forms, and completion of forms, observations and assessments.
- i. Assessments and observations of students in accordance with evaluation plans, as determined by Cleveland Metropolitan School District, following informed consent. Assessment and observation reports to be provided to the District's School Psychologists within a timely manner.
- j. Participation in intervention team processes to address individual student needs, which may result in observations, assessments, intervention planning and implementation, consultation with teachers and parents.
- k. Mental health support, including individual and small group counseling based on specific student needs.
- l. Confer with parents, teachers, and principals. Meet with school authorities (public and nonpublic) to ensure compliance and appropriateness of service.
- m. Complete monthly reports identifying caseloads and workloads to be provided to Psychological Services and Auxiliary Services on a quarterly basis.
- n. All requests for changes to the schedules and allocated days must be sent to Auxiliary Services, in writing and signed by the Principal. No changes are permitted to be made until authorized, in

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writing, by the District. The District reserves the right, at any time, to request a replacement Psychologist due to non-performance, significant challenges with job performance following attempts at remediation, and/or excessive absences.

- o. Psychologists shall be in possession and useful knowledge of testing instruments, equipment and/or materials necessary to provide appropriate services to the diverse student population.
- p. Monitor personnel and provide assistance, support and/or in-service on a continuing basis. If a psychologist is on an improvement plan or receiving individualized support, based on performance, this information is to be shared with the District.
- q. Service provider must be willing to intervene with the psychologist assigned to a nonpublic school site when conflict arises during the course of a work assignment. Resolution of specific issue should be made in writing to the Funded Programs Director and Psychological Supervisor prior to final disposition.
- r. Personnel performance records for all personnel providing services to nonpublic schools should be submitted to the Cleveland Municipal School District by June 30th of each school year, per request of the Ohio Department of Education
- s. Provide documentation of professional development offered to School Psychology staff throughout the year
- t. Monitor closely, the time service was rendered by each individual to ensure that contractual obligations were met. Report time service was rendered by accurate invoice, by school, on a monthly basis to ensure periodic reconciliation of time and amounts remaining in each school account.
- u. A quarterly report (Dec. 30, March 30 and June 30) of all psychological services for students attending the nonpublic school of service shall be submitted to the Supervisor of Psychological Services or Nonpublic Coordinator, Cleveland Municipal School District, with copies to the Director of Funded Programs and Director of Special Education.
- v. Ensure that any transactions, special reports or requests to/or from any Cleveland Municipal School District department or division /Nonpublic School shall be with the knowledge and consent of the Auxiliary Services Office
- w. Tentative Locations and Number of Days of Service**

School	Number of Days Per Week	Number of Days Per Year
704 BENEDICTINE	5	185
720 LUTHER MEMORIAL	2	74
725 OUR LADY OF ANGELS	2	74
726 MARY QUEEN OF PEACE	3	111
736 CLEVELAND MONTESSORI	1	37
738 ST. AGATHA/ST. ALOYSIUS	1	37
747 ST. FRANCIS	4	148
753 ST. JEROME	2	74
766 ST. LEO THE GREAT	1	37
769 ST. MARK	2	74
772 ST. MARY BYZANTINE	1	37
812 ST. MARTIN DEPORRES	1	37

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iii. Speech and Language Pathology Services – Performance Requirements/Specifications

- a. The successful proposer will be required to provide a staff of approximately **8.1 Licensed Speech/Language Pathologists**. Only one Speech/Language Pathologist is to be assigned to each school to ensure continuity of services on an ongoing basis. Speech/Language Pathologists (SLPs) must render services during school hours and in accordance with the nonpublic schools' schedules. The District reserves the right to request additional FTE's during the term of the RFP.
- b. Daily speech/language pathology services, to include assessments (where requested by the nonpublic school), participation in building IEP/Intervention teams (where requested by the nonpublic school), identification of students suspected of having a speech-language disability, and individual, small group and classroom-based therapeutic intervention for identified students, complete hearing screenings for all students in grades K, 1, 3, 5, 7, 11, students currently on a service plan and any new students who are referred for evaluations. Services must be provided to the 25 schools listed below, in the specified time increments.
- c. The rate of service is based per site according to the schedule.
- d. Proposer must submit with the proposal a listing of the personnel who will provide the services for each school including their certification, credentials and/or licenses to perform services as a Speech/Language Pathologist. Include their level of experience as a licensed Speech/Language Pathologist. List should identify supervisory personnel responsible for monitoring and evaluating personnel. No Speech/Language Pathologist with an evaluation lower than average shall be included in the assignment list.
- e. The successful service provider agrees to complete a criminal background check and drug screening on any of its employees who provide services in the school district under the agreement and who are required by Ohio Revised Code Section 3319.39, 3319.31 or 3319.392 as amended. A copy of all such background checks shall be provided by the successful service provider to the District at the service provider's expense.
- f. Providing therapeutic intervention and assessment to students individually, in small groups or classroom based in accordance with:
 - i. The student's Service Plan or Intervention Plan
 - ii. The Individuals with Disabilities Education Act ("IDEA") (as applicable)
 - iii. The Ohio Standards for Schools Serving Students with Disabilities ("Ohio Standards")
 - iv. The Guidelines for Providing Services to Children with Disabilities Parentally Placed in Ohio Chartered Non-public School (the "Guidelines")
 - v. The Laws and Regulations Governing the Ohio Board of Speech-Language Pathology and Audiology
 - vi. The American Speech/Language Hearing Association Code of Ethics and Scope of Practice
 - vii. Current ethical and professional standards of practice.
- g. Pre-referral consultation and intervention services. (i.e. school Intervention Team Member)
- h. Completing, maintaining and disseminating all appropriate forms including parent permission forms, record release forms, Communicative Status Reports, Speech-Language Evaluation Team Reports and any information or reports as needed by the Cleveland Municipal School District to comply with local, state or federal regulations and Cleveland Municipal School District time frames

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- i. Upon written receipt of parental permission, conducting multifactor evaluations of students with suspected speech-language impairments or re-evaluations, as requested by the nonpublic school. This will include conferences with teachers, parents, nurse, social services, administering and scoring of any instrument necessary to measure hearing, articulation, phonology, expressive/receptive language, voice fluency pragmatic language and/or written language or any necessary tool to determine eligibility for the appropriate services. Follow-up with referrals to outside professionals as needed.
- j. Participating as a team member as requested by the nonpublic school to write Individual Education Programs, Service Plans and Intervention Plans for students eligible for speech-language services in accordance with IDEA, the Ohio Standards and the Guidelines.
- k. Invoices must be received within 30 days of the services being rendered. Final invoice for the current school year must be submitted by June 15th of that fiscal year. Any invoices submitted exceeding 30 days of service are subject to non-payment.
- l. All requests for changes to the schedules must be sent to Auxiliary Services, in writing, and signed by the Principal. No changes are permitted to be made until authorized, in writing, by the District. The District reserves the right, at any time, to request a replacement Speech/Language Pathologist due to non-performance and/or excessive absences.
- m. Proposer will ensure that its personnel, in particular its SLPs will:
 - i. Work cooperatively with the District staff, non-public school staff and parents to recommend interventions to remediate speech-language disorders of students at the nonpublic schools. Participate on Evaluation and Building Assistance Teams. Provide appropriate reports to the District Office of Related Services.
 - ii. Ensure that all appropriate forms used by Cleveland Municipal School District in the identification and placement process should be used for Cleveland resident students.
 - iii. Assess results of Multifactor Evaluations for students at nonpublic schools.
 - iv. Make available, documented daily/weekly activities and quarterly caseloads and status reports submitted to Nonpublic School Principals, the District Office of Related Services and Auxiliary Services.
 - v. Provide on-site therapeutic intervention (individual, group) to address goals indicated on student Service Plans or Intervention Plans.
 - vi. Confer with parents, teachers, and principals. Meet with school authorities (public and nonpublic) to ensure compliance and appropriateness of service.
 - vii. Monitor personnel and provide assistance, support and/or in service on a continuing basis.
 - viii. Provide services relating to the needs of a diverse student population including documentation of staff participation in diversity training.
 - ix. Monitor closely, the time service rendered by each individual to ensure that contractual obligations were met. Report time service rendered by accurate invoice, by school, on a monthly basis to ensure periodic reconciliation of time and amounts remaining in each school account.
 - x. Prepare a quarterly report (Dec. 1, Feb 1 and June 15) of all speech/language pathology services provided to Cleveland resident students to be submitted to the District's Office of Related Services. The typed, final report should include such data as numbers of

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students receiving S-L as a primary service as opposed to as a related service. The report should indicate student age, disability category and disorder. This is in addition to the number of students evaluated and placed by race, age and annual caseload of multifactor evaluations per SLP and quarterly status of each caseload to include typed final report.

- xi. Prepare a final report using forms provided by the District's Office of Related Services.
- xii. Ensure that any transactions, special reports or requests to/or from any Cleveland Municipal School District department or division, or from a nonpublic school shall be completed or carried out with the knowledge and consent of the Auxiliary Services Office.
- xiii. Be in possession and useful knowledge of testing instruments, equipment (including audiometers) and/or materials necessary to provide appropriate services to the diverse student population.
- xiv. Ensure that personnel performance records for all personnel providing services to nonpublic schools should be submitted to the Cleveland Municipal School District by June 30th of each school year, per request of the Ohio Department of Education.
- xv. Services provider's supervisory personnel must intervene as necessary to resolve any conflicts that may arise during the course of the SLPs work assignment at a nonpublic school. Resolution of specific issues should be made in writing to the Funded Programs Director and Manager of the Office of Related Services prior to final disposition.

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n. Tentative Locations and Number of Days of Service

i.

School	Number of Days Per Week	Number of Days Per Year
713 HOLY NAME ELEMENTARY	1	37
720 LUTHER MEMORIAL	2	74
725 OUR LADY OF ANGELS	3	111
726 MARY QUEEN OF PEACE	3	111
731 OUR LADY OF MT. CARMEL	2	74
735 ST. ADALBERT	1	37
736 CLEVELAND MONTESSORI	1.5	55
738 ST. AGATHA/ST. ALOYSIUS	2	74
747 ST. FRANCIS	3	111
749 ARCHBISHOP LYKE-ST. HENRY	1	37
751 ST. IGNATIUS ELEMENTARY	2	74
753 ST. JEROME	1	37
766 ST. LEO THE GREAT	1	37
769 ST. MARK	2	74
772 ST. MARY BYZANTINE	2	74
785 ST. ROCCO	3	111
787 ST. STANISLAUS	2	74
789 METRO CATHOLIC	5	185
792 ST. THOMAS AQUINAS	1	37
887 BRIDGE AVE.	1	37
956 AL IHSAN	1	37

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Part II: RFP SUBMISSION REQUIREMENTS & INSTRUCTIONS TO SERVICE PROVIDERS

Part II of the RFP provides a detailed set of directions which the service provider will use to prepare the response.

The following submission and formatting requirements are applicable to each proposal response and scope of work. Service providers must submit a cost proposal and costing form for each scope of work they are proposing to provide services, although only one proposal submission is required.

Section A: Proposal Submission & Formatting

i. Proposal Submission Requirements

- a. The District discourages overly lengthy and costly proposals. In order for the District to evaluate proposals fairly and completely, service providers should follow the format set forth herein and provide all of the information requested. Proposals that do not adhere to these formatting requirements may be considered non-responsive.
- b. All proposals shall be made upon the Proposal Form(s) furnished. All information requested in the proposal and in the proposal, package must be filled in legibly and completely with blue ink signatures, or the proposal may be considered non-responsive. **Proposal Name: Comprehensive Student Support Services and #21347 must be on the outside of the envelope of submittals including shipping labels.**
- c. Proposals 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 **June 20, 2022**. **Mailing of Proposals are encouraged. However, hand deliveries will be accepted from 12:00 pm to 1:00 pm on June 20, 2022.**
- d. All submissions must include **one (1) original with blue signatures, one (1) copy, and one (1) electronic proposal on a USB B Flash Drive**. Service providers not complying with this requirement will be notified that they have twenty-four (24) hours in which to comply with this requirement or their proposal may be disqualified. This applies to **copies only**. All materials submitted are as is.
- e. 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 May 26, 2022**. The District will **NOT ACCEPT** any telephone calls regarding any of the submittals and/or "short lists." Under no circumstances should any firm interested in providing the services identified in the RFP, their designees, or anyone affiliated with their firm, contact any other District employee or official during the RFP process, in an attempt to lobby or influence the selection of a service provider pursuant to this RFP. No oral, telephonic, telegraphic, or electronic modifications will be considered.
- f. There will be a Pre-Proposal Meeting at **11:00 AM on May 25, 2022**. The meeting will be held Via Zoom. The Zoom link is as follows:
<https://clevelandmetroschools.org.zoom.us/meeting/register/tZYoceGopjgtGdM49UpYA7d6tOlc2KPBEViW>

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- 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.
- h. Proposals must remain open and valid for ninety (90) days from the opening date, unless the time for awarding the contract is extended by mutual consent of the District and service provider. Service providers may withdraw their proposals any time before proposal opening date by providing written notice to the Purchasing Department before the time and date set for the proposal opening.

ii. Proposal Format Requirements

- a. The Comprehensive Student Support Services scope of work for RFP #21347 is described in Part I. Service Providers are required to provide the information below as well as complete the Purchasing documentation in Appendix A. The narrative part of the proposals must present the following information and be organized with the following headings. Each heading should be separated by tabs or otherwise clearly marked.
- b. Proposal responses are to be divided into sections as follows:

 - i. **Transmittal Cover Letter:** Prepare a letter transmitting the proposal 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 letter shall also contain a statement that the proposal is a firm offer for a ninety (90) day period.
 - ii. A completed set of Required Purchasing Division documents set forth in Appendix A of this RFP.
 - iii. General Information Section

 - 1. **Executive Summary:** Information about the service provider's history, structure, organizational metrics, and qualifications for fulfilling the District's requirements
 - 2. **Business Health:** information about the service provider's financial structure and viability, particularly as it relates to fulfilling a multiple year agreement.
 - 3. **Experience:** information about the service provider's current and previous contracts, particularly those with organizations similar to the District.
 - 4. **General Narratives** about at least three clients using services similar to those being proposed for the District.
 - 5. **Management support services:** information about staff, project, issue, performance, quality, and risk management methodology.
 - 6. **Security:** information about the service provider's policies, practices, and standards for maintaining the confidentiality and integrity of client's data, intellectual property, and trade secrets.
 - 7. **Risks:** service provider's evaluation of the greatest challenges and risks associated with the particular services and suggestions for mitigating risk.

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- vii.** The required insurance must be provided by a company licensed by the State of Ohio and be financially acceptable to the District.
- viii.** In submitting a proposal, 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
- ix.** The District has a Diversity Business Enterprise and Affirmative Action Program in effect. Information about this program and forms for compliance are set forth in Appendix E. All service providers submitting a proposal must complete the appropriate forms and submit same with their proposal.

Section C: Evaluation Process

- i.** Proposals will be evaluated, first, as responsive or non-responsive to the RFP's specifications. A preliminary review will be conducted of all proposals submitted on time to ensure the proposal adheres to the mandatory requirements specified in the RFP. Proposals that do not meet the mandatory requirements will be deemed non-responsive and may be rejected. In the event that all proposers do not meet one or more of the mandatory requirements, the District reserves the right to continue the evaluation of the proposals and to select the proposal(s) which most closely meets the requirements specified in the RFP. Responsive proposals to this RFP must include, or meet, the following mandatory requirements:
 - a.** Timely Submission
 - b.** Transmittal Cover Letter
 - c.** Response to proposal requirements
 - d.** Experience and qualifications to provide the services
 - e.** Cost Proposals including signature
 - f.** District Related Forms
 - g.** Signature affidavit of non collusion
 - h.** References
- ii.** Second, the proposals will be evaluated based on the information presented in the proposal and on additional information obtained during the evaluation process. Responses will be evaluated based on the following weighted criteria:
 - a.** Price of proposed services **(35%)**
 - b.** Quality of proposed services and understanding the needs of the individual schools and the district; proper staff certifications and credentials **(25%)**
 - c.** Physical proximity to the District, local access, and a dedicated local office **(25%)**
 - d.** Prior experience providing qualified, timely, efficient, flexible staffing for school districts **(15%)**Evaluations are based on the submitted proposal. Follow-up discussions with the proposer's best suited to complete the work may be requested. The District reserves the right to interview or to seek additional information related to criteria already specified in the RFP after opening the proposals, but prior to entering into a contract, to reject any or all proposals, and to award a contract to one or multiple service

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providers as the District deems necessary to meet its objectives. The District also reserves the right to check references identified by any proposer from any service provider that submitted a proposal. The District will select the proposal(s) deemed to be most advantageous, with price and other criteria factors considered

Section D: All District Related Forms

There are a number of REQUIRED forms in Appendix A of the RFP that must be completed by the service provider. These forms must be completed, signed as described in the text and included in the service provider 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 1 & 2
- h.** Employee Data Form
- i.** References

Section E: Award of Contract

- i.** The contents of the RFP, including all appendices and addenda thereto, and the commitments set forth in the proposals shall be considered contractual obligations. Failure to accept these obligations may result in cancellation of the award.
- ii.** The contract award will not be final until the District and the selected Service Provider execute a mutually satisfactory contractual agreement.
- iii.** The Contract Documents consist of the following:
 - a.** District Contract
 - b.** RFP – Part 1
 - c.** RFP – Part 2
 - d.** Cost and Pricing Proposal
 - e.** All Required District forms set forth in Appendix A
 - f.** All applicable addenda
- iv.** The service provider shall perform all work described in the Contract Documents, including without limitation, all terms and conditions of the scope of work and specifications contained herein or otherwise stated in the Contract Documents reasonably inferable there from by the service provider as necessary to produce the results intended therein

**CLEVELAND MUNICIPAL SCHOOL DISTRICT
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Part III: COST PROPOSAL AND PRICING

The following submission and formatting requirements are applicable to each proposal response and scope of work. Service providers must submit a cost proposal and costing form for each scope of work they are proposing to provide services, although only one proposal submission is required.

Section A: Nursing Services Cost Proposal Form

- i. The undersigned proposes to provide Nursing Services for the 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 service provider confirms that the offer below is good for a period of ninety (90) days from submittal due date. The term of this Agreement will be from September 1, 2022 through August 31, 2025 pending authorization of funds at the discretion of the District. There are two renewal options for this agreement. Renewal Option 1 is for the 25-26 School Year (September 1, 2025 through August 31, 2026). Renewal Option 2 is for the 26-27 School Year (September 1, 2026 through August 31, 2027). These renewal options will be under the same terms and conditions as the current contract year and at the discretion of the District. The District reserves the right to request additional pricing from the awarded Service providers for services not identified herein. Service provider shall provide the best rates for services later identified by the District based on the request and in accordance with the specifications and requirements outlined herein. Pricing must be all inclusive of services to be provided including administrative support. The District does not guarantee utilization of services or make any comment as to minimum amount of services through the term of any awarded agreement.

Term	Hourly Rate
September 1, 2022 – August 31, 2023	\$ _____
September 1, 2023 – August 31, 2024	\$ _____
September 1, 2024 – August 31, 2025	\$ _____

- ii. Optional Pricing (Include any optional pricing below using a separate page if necessary):

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Section B: Psychological Services Cost Proposal Form

i. The undersigned proposes to provide Psychological Services for the 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 service provider confirms that the offer below is good for a period of ninety (90) days from submittal due date. The term of this Agreement will be from September 1, 2022 through August 31, 2025 pending authorization of funds at the discretion of the District. There are two renewal options for this agreement. Renewal Option 1 is for the 25-26 School Year (September 1, 2025 through August 31, 2026). Renewal Option 2 is for the 26-27 School Year (September 1, 2026 through August 31, 2027). These renewal options will be under the same terms and conditions as the current contract year and at the discretion of the District. The District reserves the right to request additional pricing from the awarded Service providers for services not identified herein. Service provider shall provide the best rates for services later identified by the District based on the request and in accordance with the specifications and requirements outlined herein. Pricing must be all inclusive of services to be provided including administrative support. The District does not guarantee utilization of services or make any comment as to minimum amount of services through the term of any awarded agreement.

ii. Number of Psychologists Proposed _____

iii.

Term	Hourly Rate
September 1, 2022 – August 31, 2023	\$ _____
September 1, 2023 – August 31, 2024	\$ _____
September 1, 2024 – August 31, 2025	\$ _____

iv. Optional Pricing (Include any optional pricing below using a separate page if necessary):

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v. *Service providers must complete the signatory requirement below*

COMPANY NAME: _____

REPRESENTATIVE: _____
PRINT (TITLE)

SIGNATURE: _____

ADDRESS: _____

CITY: _____ STATE: _____

TELEPHONE: () _____ FAX NO: () _____

E-MAIL ADDRESS: _____

DATE: _____

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Section C: Speech/Language Pathology Services Cost Proposal Form

i. The undersigned proposes to provide Speech/Language Pathology Services for the 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 service provider confirms that the offer below is good for a period of ninety (90) days from submittal due date. The term of this Agreement will be from September 1, 2022 through August 31, 2025 pending authorization of funds at the discretion of the District. There are two renewal options for this agreement. Renewal Option 1 is for the 25-26 School Year (September 1, 2025 through August 31, 2026). Renewal Option 2 is for the 26-27 School Year (September 1, 2026 through August 31, 2027). These renewal options will be under the same terms and conditions as the current contract year and at the discretion of the District. The District reserves the right to request additional pricing from the awarded Service providers for services not identified herein. Service provider shall provide the best rates for services later identified by the District based on the request and in accordance with the specifications and requirements outlined herein. Pricing must be all inclusive of services to be provided including administrative support. The District does not guarantee utilization of services or make any comment as to minimum amount of services through the term of any awarded agreement.

ii. Number of Speech and Language Pathologists Proposed _____

iii.

Term	Hourly Rate
September 1, 2022 – August 31, 2023	\$ _____
September 1, 2023 – August 31, 2024	\$ _____
September 1, 2024 – August 31, 2025	\$ _____

iv. Optional Pricing (Include any optional pricing below using a separate page if necessary):

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v. *Service providers must complete the signatory requirement below*

COMPANY NAME: _____

REPRESENTATIVE: _____
PRINT (TITLE)

SIGNATURE: _____

ADDRESS: _____

CITY: _____ STATE: _____

TELEPHONE: () _____ FAX NO: () _____

E-MAIL ADDRESS: _____

DATE: _____

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Appendix A: District Related Forms

Section A: Addendum Acknowledgement Form for RFP #21347

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
_____	_____
_____	_____
_____	_____
_____	_____

Proposer: _____

The undersigned Service provider 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 response to be rejected***

Signature: _____ Date: _____

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Section B: 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 debarment, 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

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Section B: Certificate of Debarment Continued.

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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.

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Section C: Conflict of Interest Form

Statement of Potential Conflicts of Interest

Service Provider 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 service provider 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 service provider's board of directors, hold any officer position with the service provider, or own any shares of any stock issued by the service provider?

Yes _____ No _____

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

Name: _____

Position: _____

If **yes**, and if the CMSD employee, CMSD board member, or immediate family member owns share of any stock in the service provider 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 service provider?

Yes _____ No _____

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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 service provider 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: _____

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Section D: Proposer Qualifications Form

Proposer 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

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- 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 contractor 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.

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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 RFP.

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.

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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 RFP, 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 RFP.

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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: _____

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Section E: 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: _____

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Section F: Diversity Business Enterprise Program and Participation Forms

PROGRAM OVERVIEW

It is the goal of the Diversity Business Enterprise (DBE) program to ensure the firms owned and/or controlled by minorities and women have the opportunity to compete for any expenditure of funds including but not limited to contracts, lease purchase, requisitions, and all forms of equipment, work services, materials, construction, etc.

The DBE program shall make every good faith effort to ensure that certified DBE's in the relevant Cleveland Municipal School District geographic market have the maximum opportunity to proposal for contracts. The Cleveland Municipal School District geographic market is Cuyahoga, Summit, Lake, and Lorain counties.

The District has established goals for DBE participation in all contracts that it awards. The goals range from 15 to 30 percent and vary by the type of contract awarded:

- 15% Service Contracts
- 20% Goods and Supplies
- 30% Maintenance/Construction Repair

A Diversity Business Enterprise encompasses Minority Business Enterprises (MBEs) and Female Business Enterprises (FBEs)

A DBE is an enterprise in which minorities, African Americans, Native Americans, Hispanic or Latin Americans, Asian Pacific Islander Americans, and/or women own at least 51% of the shares of stock or controlling interest.

A FBE is a female-owned enterprise with at least 51% of the shares of stock or controlling interest, which is held by female.

A company may be in compliance with the District's DBE program although the applicable numerical goal is not met if a company makes a good faith commitment to comply with DBE regulations. The Purchasing Director determines whether a company has made a good faith commitment.

DBE requirements under certain circumstances can be waived by the district with convincing proof of good faith efforts.

TERMS AND CONDITIONS OF NOTICE AND REQUIREMENTS TO ENSURE DIVERSITY BUSINESS ENTERPRISE (DBE) OPPORTUNITY

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Definition of DBE: A Diversity Business Enterprise (DBE)

“Small Diversity business concern” means a small business concern that is at least fifty-one (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 fifty-one (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 fifty-one (51) percent unconditionally owned by an economically diverse Indian tribe or Native Hawaiian Organization, or a publicly owned business that has at least fifty-one (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.

1. “Socially diverse individuals” means individuals who have been subjected to racial or ethnic prejudice or culture bias because of their identity as a member of a group without regard to their qualities as individuals.
2. “Economically diverse individuals” means socially diverse individuals whose ability to compete in the free enterprise system is impaired due to diminished opportunities to obtain capital and credit as compared to others in the same line of business who are not socially diverse. Individuals who certify that they are members of named groups (African Americans, Hispanic Americans or Latin Americans, Native Americans, Asian-Pacific Islander Americans, Subcontinent Asian Americans) are to be considered socially and economically diverse.

Definition of FBE: Female Business Enterprise (FBE)

“Female-owned small business concern” means a small business concern:

1. Which is at least fifty-one (51) percent owned by one or more women; or, in the case of any publicly owned business, at least fifty-one (51) percent of the stock of which is owned by one or more women and;
2. Whose management and daily business operations are controlled by one or more woman.

TERMS

1. DBE participation will be counted toward meeting the goals outlined in the notice as follows:
 - a. The total dollar value of a correct contract or subcontractor indirect subcontract awarded toward a certified DBE will be counted toward the applicable goal.
 - b. In the case of a joint venture, certified by the Cleveland Municipal School District, the portion of the total dollar value of the contract equal to the percentage of the ownership and control of the DBE partner in the joint service provider will be counted toward the applicable goal. (PLEASE RETURN DBE FORM E)
 - c. Only expenditures to DBE that perform a commercially useful function in the work of a contract or subcontract or indirect subcontract will be counted toward DBE goals. A DBE is considered to

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perform a commercially useful function when it is responsible for execution of a distinct element of work of a contract or subcontract and carries out its responsibilities by actually performing, managing, and supervising the work involved. If a DBE contractor subcontracts a significantly greater portion of the work of the contract than would be expected on the basis of normal industry practices, the DBE is presumed not to be performing a commercially useful function. The DBE may present evidence to rebut this presumption.

- d. The total dollar value of materials and supplies obtained from DBE suppliers and manufacturers will be counted toward DBE goals if the DBE assumes the actual and contractual responsibility for the provision of the materials and supplies.
2. A proposer who fails or refuses to complete and return this Notice may be deemed a non-responsive proposer.
 3. The contractor's goals as set forth in this Notice shall express the contractor's commitment to the percentage of DBE utilization during the term of this contract. The contract shall be deemed to have met its commitment for DBE utilization if the DBE utilization rate of the contractor meets the goals established by this Notice.
 4. The contractor must receive the approval of the District before making substitutions for any subcontractors listed in the Notice. Substitution of DBE is not allowed unless the contractor receives District approval.
 5. The contractor's commitment to a specific goal is to meet the DBE objectives and is not INTENDED and shall not be used to discriminate against any qualified company or group or companies.
 6. The contractor's commitment to a specific goal for DBE utilization as required by this Notice shall constitute a commitment to make every good faith effort to meet such goal by a subcontracting to or undertaking to joint venture with DBE firms. If the contractor fails to meet the goal, it will carry the burden of furnishing sufficient documentation as part of the proposal response of its good faith efforts to justify a grant of relief from the goals set forth in this Notice. Such justification will take the forms of a detailed report which will document at least the following information:
 - a. Attendance at the pre-proposal meeting, if any, scheduled by the District to inform DBE's of Subcontracting opportunities under a given solicitation.
 - b. Advertisement in general circulation media, trade association publications, and minority-focus media for at least twenty (20) days before bids or proposals are due. If twenty (20) days are not available, publication for a shorter reasonable time is acceptable.
 - c. Written notification to DBE that their interest in the contract is solicited, and follow-up contact to determine whether the DBE's were interested.
 - d. Efforts made to select portions of the proposed work to be performed by DBE in order to increase the likelihood of achieving the stated goals.

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- e. Efforts to negotiate with DBE for specific sub-proposal, including at a minimum:
 - i. The names, addresses, and telephone numbers of DBE's that were contacted.
 - ii. A description of the information provided to DBE regarding the plans and specifications for portion of the work to be performed; and
 - iii. A statement of why additional agreements with DBE were not reached.
 - iv. Completion of (Form E) if DBE's are not involved in the RFP.
 - f. Concerning each DBE the supplier/contractor contacted but rejected as unqualified, the reasons for the supplier's/contractor's conclusion.
 - g. Efforts made to help the DBE's contacted that needed assistance in obtaining required bonding, lines of credit, or insurance.
 - h. Use of the services of minority community organizations, minority contractor's groups, governmental minority business assistance offices, and other organizations that assist in the recruitment and placement of DBE's.
7. Suppliers/contractors that fail to meet DBE goals and fail to demonstrate sufficient good faith efforts are not eligible for contract awarded.
8. The District, through its Diversity Officer will review the contractor's minority business enterprise involvement efforts during performance of this contract. Such review will include, but not be limited to, contractor's quarterly statement of income from the District and what portion of said income went to the DBE enterprise(s) as evidenced by affirmation of the DBE enterprise(s) which the contractor hereby agrees to supply each quarter during the term of its contract with the District. If the contractor meets its goal or if the contractor demonstrates that every reasonable effort has been made to meet its goal, the contractor shall be presume to be in compliance. Where the Diversity Officer finds that the contractor shall be presume to be in compliance. Where the Diversity Officer finds that the contractor has failed to comply with the requirements of this Notice, said Diversity Officer shall inform the Purchasing Director who shall immediately notify the contractor to take corrective action. If the contractor fails or refuses to comply promptly, then the Purchasing Director, upon approval of the District, shall issue an order shopping all or part of the work until satisfactory corrective action has been taken. No part of the time lost due to any such stop orders shall be made subject of claim for extension of time or for excess costs or damages by the contractor. When the District proceeds with such formal action it has the burden of proving that the contractor has not met the requirements of coming forward and showing that it has met the good faith requirements of the Notice, specifically including paragraph 7 hereof. Where the contractor is found to have failed to exert every good faith effort to involve DBE in the work provided, the District may declare that the contractor is ineligible to receive further District funds, whether as a contractor, subcontractor, or as a consultant, for a period of up to three (3) years.

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9. The contractor will keep records and documents for three (3) years following performances of this contract to indicate compliance with this Notice. These records and documents, or copies thereof, will be made available at reasonable times and places for inspection by any authorized representative of the District upon request together with any other compliance information which such representative may require.
10. Proposers and contractors are bound by all requirements, terms and conditions of this Notice.
11. Nothing in this Notice shall be interpreted to diminish the present contract compliance review

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i. 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: _____

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DO NOT COMPLETE BELOW THIS LINE

___ Compliant ___ Compliance Pending ___ Non-Compliant

Compliance Date: _____

(signature, DBE Department)

(date)

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ii. 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 at 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.

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iii. 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: _____

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iv. 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 RFP)

Name of FBE Firm

Signature of FBE Firm

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v. 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

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**vi: 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 _____

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vii: DBE Form G

This form need not be completed if all join 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: _____

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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 service provider is a subcontractor.

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**viii: 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

CLEVELAND MUNICIPAL SCHOOL DISTRICT

COMPREHENSIVE STUDENT SUPPORT SERVICES

Section G: EOA Contractual Declaration Forms

CMSD Affirmative Action Program

Service provider Contract Compliance, Procedures and Guidelines

Note: Please read carefully all of the information contained in these documents.

Pursuant to the Affirmative Action Policy Adopted by the Cleveland Municipal School District, the following guidelines and procedures will be implemented to ensure that all service providers doing business with the District are in compliance with Equal Employment Opportunity Standards.

A. SUBMISSION OF SERVICE PROVIDER EMPLOYMENT PRACTICE REPORT

All service providers and contractors who propose to provide goods, services, supplies, and equipment through formal proposals, informal proposals, and contract term agreements are required to submit a Service provider Employment Practice Report with each Proposal. Approved status by the Service provider Employment Practice Report includes the following documents which must be completed in their entirety and returned with the proposal.

Please note, compliance approval consists of both DBE and Service provider Contract Compliance approval.

1. General Information Sheet (Form 1): Provides basic information on the service provider.

1a. SMSA/OR RECRUITMENT AREA: Indicates the relevant labor area in which your facility is located. Designate the Standard Metropolitan Statistical Area, county, or city from which the facility can draw applicants or recruit for most positions.

In making relevant labor area determinations, examine the statistics on racial, ethnic, and gender composition of the Standard Metropolitan Statistical Area, county, or city surrounding your organization, as well as other appropriate adjacent areas.

The relevant labor area should be the SMSA county or city with the highest population of minorities and women.

1b. DEFINITION: As defined by the U.S. Bureau of the Census, SMSA is: "Except in the New England States, a county or group of contiguous counties which contains at least one city of 50,000; in addition, contiguous counties if they are socially and economically integrated within the central city; in the New England States towns and cities instead of counties. Each SMSA must include at least one central city."

2. **Compliance Declaration Form** (Form 2) - The Agreement indicating the service provider is in compliance with Equal Employment Opportunity requirements, will take affirmative action, and will comply with all Fair Labor Standard practices.

3. **Current Employment Data Form** (Form 3) – Current personnel data indicating employees in each job category classified by gender and race.

4. **Existing Affirmative Action Program** – If any and copies of any agreement between the service provider and the Equal Employment Opportunity Commission, Office of Federal Contract Compliance Program or court order pertaining to equal employment opportunity.

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B. EVALUATION OF COMPLIANCE DATA

1. The Diversity Officer will evaluate data submitted by service providers who are recommended to receive District proposals and contracts. Service providers found in compliance with the District's Equal employment opportunity standards (Affirmative Action and DBE Program) will be placed on the approved service provider's list.
2. In the event that a service provider is found not in compliance with the District's equal employment opportunity standards, the Diversity Officer will inform the Purchasing Director of the Reason(s) and ask that the Purchasing Director not award the contract or proposal to the service provider pending compliance. The Purchasing Director or Manager of Diversity will inform the service provider of reason(s) for non-compliance. Service providers found not in compliance will be given ten (10) business days from the time of notification by the Purchasing Director or Manager of Diversity to submit an acceptable affirmative action program to the Diversity Officer.
3. If the service provider which has been found not in compliance submits an acceptable affirmative action plan to the Diversity Officer within ten (10) business days of notification, the service provider may be given conditional approval.

C. AFFIRMATIVE ACTION PLAN

1. Service provider found not in compliance with the District's equal employment opportunity standards are expected to develop and implement affirmative action programs if they expect to be eligible to successfully propose for District contracts.
2. While it is the service provider's responsibility to develop an affirmative action program which will result in equal employment opportunity for persons from all sectors of the community, the Officer in Charge of the Diversity Program may refer prospective proposers to resources which may be of assistance in developing affirmative action programs.
3. In the event that a service provider who has been awarded a District contract does not make satisfactory progress toward goals in the affirmative action program, the District will not negotiate a new contract until the service provider assures the Diversity Officer that significant progress will be made.

D. CONDITIONS UNDER WHICH PROPOSALS MAY BE REJECTED OR CONTRACTS TERMINATED ON EQUAL EMPLOYMENT OPPORTUNITY GROUNDS

1. Service provider fails to submit completed and signed EEO documents with proposal or other requested information in a timely manner.
2. The service provider is found not to be in compliance with EEO laws, regulations and District policy, and does not have an acceptable Affirmative Action Program, or if the service provider has an acceptable Affirmative Action Program but the Diversity Officer determines the service provider has not made satisfactory progress toward goals in the plan and shows no promise of achieving the goals.
3. Any inconsistencies of misrepresentation of the facts in any of the requested information designed to portray the service provider in a more favorable position with respect to Equal Employment Opportunity Compliance will be grounds for cancellation of the contract by the Purchasing Director upon recommendation by the Diversity Officer and confirmation by the Cleveland Municipal School District.

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Form i. 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 Service provider:

Compliance Conditional Compliance

Non-Compliance Compliance Pending

Comments: _____

Date: _____ Signature: _____

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Form ii: 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 ensure 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)

(Signature of Company Official)

Date: _____

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____.

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DESCRIPTION OF JOB CATEGORIES

OFFICIALS, MANAGERS, AND SUPERVISORS

Occupations requiring administrative personnel who set District policies, exercise overall responsibility of the places, and direct individual departments or special phases of a firm's operations includes officials, executives, middle management, plant managers, department managers, and superintendents, salaried supervisors who are members of management, purchasing agents, buyers, and kindred workers.

PROFESSIONALS

Occupations requiring either college graduation or experience of such kind and amount as to provide background. Includes: accountants and auditors, airplane pilots and editors, engineers, layers, librarians, mathematicians, natural scientists, personnel and labor relations workers, physical scientists, physicians, social scientists, teacher's and kindred workers.

TECHNICIANS

Occupations requiring a combination of basic scientific knowledge and manual skill which can be obtained through (about) two years of post-high school education, such as that which is offered in many technical institutes and junior colleges, or through equivalent on-the-job training. Includes: drafters, engineering aides, junior engineers, mathematical aids, nurses, photographers, radio operators, scientific assistants, surveyor of technical illustrators, technicians (medical, dental, electronic, physical sciences), and kindred workers.

SALES WORKERS

Occupations engaging wholly or primarily in direct selling. Includes: advertising agents and salespersons, insurance agents and brokers, real estate agents and brokers, stock bond salespersons, demonstrators, salespersons, salesclerks, and kindred workers.

OFFICE AND CLERICAL

Includes all clerical-type work regardless of level of difficulty, where the activities are predominantly non-manual, includes bookkeepers, cashiers, collectors (bills and account), messengers and office clerks, office machine operators, shipping and receiving clerks, stenographers, typists and secretaries, telegraph and telephone operators and kindred workers.

CRAFTWORKERS (SKILLED)

Manual workers of relatively high skill level having a thorough and comprehensive knowledge of the process involved in their work, exercise considerable independent judgment, and usually receive an extension period of training. Includes: the building trades hourly paid foremen who are not members of management, mechanics and repairers, skilled machine operators, compositors and typesetters, electricians, engravers, job setters (metal), motion picture projectionists, pattern and model makers, stationary engineers, tailors and kindred workers.

OPERATIVE (SEMI-SKILLED)

Workers who operate machine or processing equipment or perform other factory-type duties of intermediate skill level which can be mastered in a few weeks and require limited training.

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LABORERS (UNSKILLED)

Workers in manual occupations which generally require no special training. Perform elementary duties that may be learned in a few days and require the application of little or no independent judgment. Includes: garage laborers, car washers and greasers, gardeners (except farmers), groundkeepers, long-shore workers, craftspeople and stevedores, lumber's and woodchippers, laborers performing lifting, digging, mixing, loading, and pulling operations, and kindred workers.

SERVICE WORKERS

Workers in both protective and non-protective service occupations. Includes: attendants (hospital and other instruction, professional and personal service), barbers, and cleaners, cooks, guards, door keepers, stewards, janitors, police officers and detectives, porters, food services, and kindred workers.

APPRENTICES

Persons employed in a program including work training and related instruction to learn a trade or craft which is traditionally considered an apprentice, regardless of whether the program is registered with a Federal or State agency.

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Form iii: Employee 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	INDIGENOUS OR ALSKAN NATIVE	HISPANIC	WHITE (NOT OF HISPANIC ORIGIN)	BLACK (NOT OF HISPANIC ORIGIN)	ASIAN AMERICAN OR PACIFIC ISLANDE	INDIGENOUS 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: _____

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Section H: References

Include below three references of equal or larger size to this current RFP 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: _____

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Reference #3:

Company/School Name: _____

Address: _____

Type of Business: _____

Contact Person: _____

Telephone and Fax#: _____

Dates of Service: _____

Description of Services Provided: _____