

## Bidder Checklist

Request for Training Proposals – 2016 RFP  
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Bidder Organization Name: \_\_\_\_\_

Training Title and Solicitation #: \_\_\_\_\_

All applicants/proposers must complete the checklist presented below and submit the following information and forms in separate Cost and Technical Proposal packages as described in the RFP. **See also RFP Section B. Process for Proposal Submission for packaging and mailing instructions.**

### **Documents Required for TECHNICAL Proposal:**

**See also RFP Sections A. Description of Services Requested & Section C. Proposal Requirements**

- Cover Letter**
- Technical Proposal Narrative – refer to RFP Sections A. B. & C.**
  - Description of Services
  - Description of Training Expertise
  - Subject Matter Expertise
  - Training Expertise with Target Population
  - Experience with Human Services Organization
  - Description of the use of Technology in Training Delivery
  
  - Summary of Services Being Bid
  - Service Description
- Description of Organizational Capacity and Organizational Chart**
- Staff Resumes or Curriculum Vitae(s)**
- Training Materials**
- References**

### **Forms and Documents Required for COST Proposal:**

**See also RFP Section E. Summary of Required Documents**

- Bidder Checklist** (no form number)
- Contract Management System (CMS) Authorization Form (OCFS-4821) SIGNED HARD COPY REQUIRED**
- Application for Training and Administrative Activities Contract (OCFS-3101) SIGNED HARD COPY REQUIRED**
- Budget (OCFS-3104) - including; Indirect Cost Rate Agreement (if applicable); and a Budget Narrative**
- Bidder Identification Form (OCFS-4553)**
- Implementation of Affirmative Action: Affirmative Action/EEO Policy Statement (no form number) or OCFS—3460 – MWBE Equal Opportunity Policy Statement**
- Non-Discrimination/Non-Sectarian Compliance (OCFS-4555)**
- Encouraging Use of New York State Businesses In Contract Performance**

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### **ADDITIONAL FORMS AND DOCUMENTS REQUIRED FOR PROPOSAL SUBMISSION BY PRIVATE FOR-PROFIT OR NOT-FOR-PROFIT ORGANIZATIONS**

- Not-for-Profits - Vendor Responsibility Documentation:**
  - Vendor Responsibility Questionnaire (on-line via VendRep System with Overview Page submittal required)  
[http://www.osc.state.ny.us/vendrep/vendor\\_index.htm](http://www.osc.state.ny.us/vendrep/vendor_index.htm)
  - OR
  - Vendor Responsibility Questionnaire (ac-3291-s) (HARD COPY VERSION WITH NOTARIZED SIGNATURE REQUIRED)
  - Board of Directors Profile (OCFS-4552) SIGNED HARD COPY REQUIRED
  - Certificate of Incorporation (no associated form)
  - Exemption from Income Taxes (no associated form)
  - Financial Statement (no associated form)
  - Proof of Workers' Compensation Coverage
  - Proof of Disability Benefits Coverage
  
- For-Profits - Vendor Responsibility Documentation:**
  - Vendor Responsibility Questionnaire (on-line via VendRep System with Overview Page submittal required)  
[http://www.osc.state.ny.us/vendrep/vendor\\_index.htm](http://www.osc.state.ny.us/vendrep/vendor_index.htm)
  - OR
  - Vendor Responsibility Questionnaire (ac-3290-s) (HARD COPY VERSION WITH NOTARIZED SIGNATURE REQUIRED)
  - Board of Directors Profile (OCFS-4552) SIGNED HARD COPY REQUIRED
  - Certificate of Incorporation (no associated form)
  - NYS Department of Tax And Finance Contractor Certification (ST-220-TD) and Contractor Certification to Covered Agency (ST-220-CA)
  - Financial Statement (no associated form)
  - Proof of Workers' Compensation Coverage
  - Proof of Disability Benefits Coverage
  
- For-Profits - MacBride Fair Employment Principles Certification – SIGNED HARD COPY REQUIRED**
  
- For-Profits - Non-Collusive Bidding Certification Required by Section 139-D of the State Finance Law Certification – SIGNED HARD COPY REQUIRED**