

Bidder Checklist

Request for Training Proposals – 2017 RFP
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Bidder Organization Name: _____

Solicitation # and Training Title and: _____

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. & C.
 - Description of Services
 - Description of Training Experience & Expertise Required
 - Subject Matter Expertise
 - Expertise and experience with Target Population(s)
 - Description of Service Delivery and Capability
- Description of Organizational Capacity and Organizational Chart
- Staff Résumés or Curriculum Vitae(s)
- Training Materials, if applicable
- 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 I-VIII) - including; Indirect Cost Rate Agreement (if applicable); and a
Budget Narrative (see separate Instructions document in Section E)
- Bidder Identification Form (OCFS-4553)
- Non-Discrimination/Non-Sectarian Compliance (OCFS-4555)

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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
 - 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
 - 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**