

## Guidelines for Preparing Letters of Interest

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Presented below are general guidelines for you/your firm to prepare a letter of interest (LOI) for submission to the NYS Office of Children and Family Services (OCFS). These guidelines will assist you with the content of your letter. Format and/or organization of your letter is up to you.

**We ask that you carefully review the New York State Contract Reporter advertisement prior to submitting the LOI.**

### General Instructions

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1. Please limit your letter of interest(s) to the number of pages, font size, line spacing and margins as stated in the Contract Reporter notice. Please insure that you are submitting the requested number of copies.
2. Please include all pertinent information in your letter of interest. information.
3. All firms listed in the LOI must be registered (and the registration must be current) with the NYS Department of State ([www.dos.ny.gov](http://www.dos.ny.gov)) and must be able to conduct business in New York State under the names stated in the LOI. If any of the firms listed in the LOI are not registered in New York State, the LOI will not be reviewed and the firm will not be considered for selection.
4. If your team is going to submit a LOI as a joint venture, please insure that the joint venture itself is registered to practice and do business in New York State. If the joint venture is not registered in advance of the LOI submission, the LOI will not be reviewed and the team will not be considered for selection.
5. When submitting your letter of interest, please do not use binders, covers, etc. A staple in the upper left corner is sufficient.
6. Please refer to the Solicitation/Letter of Interest announcement reference number in your letter of interest.
7. Please submit your letter of interest to the individual indicated in the "Submit to" section of the Contract Reporter notice. Do not submit them to the person listed under the "Contact" section of the notice.

### Instructions on Specific Elements

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Please note that these instructions provide general guidance. If you/your firm feel as though additional information is needed based upon the Contract Reporter notice (Notice), you will not be penalized as long as the letter is no longer than what is stated in the notice. Further, the order of the sections presented below does not infer how you should organize your letter of interest. As stated earlier, format and organization of your letter is up to you.

#### 1. Firm's Understanding of the Services Required

Each firm's letter will be evaluated to determine if they have any understanding of the Services Required, including any special/unique needs of the Services Described. Please ensure that your firm addresses any special needs stated in the Notice and state why your firm is uniquely qualified to provide services for this program.

#### 2. Firm's Experience

Please provide information on recent and relevant experience providing the same of similar services as described in the Notice completed within the last five years. For each service/program provide the following:

- Brief description.
- Firm's role (prime, sub) and what specific services were provided.
- Completion date.
- Dollar value.
- Client's name.
- If sub-consultants are proposed, clearly indicate assignments the sub-consultant completed.

In addition, please address the following:

- If a sub-consultant(s) is proposed, please clearly state their role and what they will be doing. Also state the percentage of the work they will complete.
- Address any special services as stated in the Notice.
- Please address any necessary certifications, software requirements, and other technical requirements.
- Location from which office the service(s)/program(s) will be managed. Also, indicate which office will complete a majority of the service.
- If there are M/W/DBE or SDVOB goals, please name the firms and indicate what they will be doing for the program. Also indicate the percentage of work they will complete. Please note that if the firm submitting the letter of interest is a M/W/DBE, they are still required to meet the M/W/DBE goals stated in the Notice.

### 3. Proposed Key Personnel

Provide the following information for each key staff member:

- Proposed role (title) for this program
- Brief description of their recent (within the last five years) and relevant experience.
- Individual's role on each of the previous program(s).
- Completion date of the previous program(s).
- Value of program of the previous programs.
- Client's name of the programs.
- Certifications and licenses of the key staff members, if applicable.

Because some of the programs listed under individual's experience could also be listed under the firm's experience, we understand some of the detail on each program may not be restated. It is recommended that a cross reference be provided.

### 4. Staff Availability

For each of the proposed key staff members, please list the individuals' current programs that require twenty (20) percent or more of their time. If a staff member is working on fewer than two programs that meet the 20 percent threshold, the firm shall list at least two of that person's largest programs. For each of the programs, please provide the program's description, the person's role, percentage of the person's time, and completion date of the person's work on that program.

If you have any questions concerning the Contract Reporter Notice, please refer to NYS Contract Reporter Notice for a contact person.