



## Opportunities for Williamson and Burnet Counties

### Proposal Solicitation for Training, Assessment, Consultation, and Access to ROMA Trainers

#### **SECTION ONE: Purpose**

The purpose of this proposal solicitation is to obtain Certified ROMA Trainers and/or Community Action Specialized Consultants to conduct: (only the items checked are being solicited)

- Intro to ROMA Training
- Board and Management Training
- Advanced or Specialized ROMA Training
- Leadership Development Guidance
- Strategic Planning Training
- Organizational Standard 4.3 Compliance Testing
- Organizational Standards Compliance Testing (complete)
- Organizational Strategic Planning Implementation Testing
- Organizational Assessment of Processes
- Organizational Assessment of Policies

Ongoing access to Nationally Certified ROMA Trainers for:

- Frontline
- Management
- Board of Directors
- Administrators





## **SECTION TWO: Description of Entity and why services are being sought**

The Agency is a private, non-profit, 501(c)3, Community Action Agency. Established in 1965, OWBC is the area's official Community Action Agency. OWBC provides resources and opportunities to thousands of children, adults, and seniors annually, to realize educational growth, economic self-sufficiency, and improved quality of life. OWBC is a Community Action Agency that provides a variety of services to the community in response to local needs, with the following mission: "To make our communities stronger by empowering children, families, and seniors to achieve independence and improved quality of life.

We are seeking the services of a certified ROMA trainer to be in compliance with the mandated TDHCA Organizational Standards and for training to meet all federal guidelines. We are seeking bids for 1 year with an option to renew for up to 4 years.





## SECTION THREE: Proposal Requirements

Responses to the Bid Solicitation must contain the following information:

- A. Fee for Intro to ROMA Course
- B. Fee For Advanced/Specialized ROMA Course
- C. Fee for Board/Management ROMA Course
- D. Fee for Board Roles and Responsibility Training
- E. Fee for Board Strategic Planning Training
- F. Per Diem costs
- G. Hotel costs
- H. Mileage reimbursement rates
- I. Other Incidental Fees
- J. Fees for on-site and off-site evaluation of Agency documents
- K. Suggested timeline for training / assessment / testing
- L. Experience providing ROMA Training to small business or corporations
- M. Experience providing training to
  - 1. Front Line Case Management Staff
  - 2. Management Staff
  - 3. Boards
  - 4. Support and Other Program staff
- N. Provide a description of training methods and tools that have proven to be successful for you in delivering ROMA Training.
- O. Provide a description of tools, activities and communication that enabled your team to be successful in working with organizations on an ongoing basis regarding ROMA.
- P. Statement disclosing all relationships that might be a conflict of interest.
- Q. Knowledge of OMB (Office of Management and Budget) Circulars and TAC (Texas Administrative Code) requirements.





## **SECTION FOUR: Proposal Rejections**

The Agency reserves the right to reject any or all submissions, in whole or in part, for any reason without incurring any costs or liability whatsoever. All proposals will be reviewed for completeness and compliance with the submission requirements. If a proposal fails to meet a material requirement in the proposal solicitation SECTION THREE, it will be considered incomplete.

All proposals may be rejected in any case where it is determined that the proposals are not competitive or where the cost is not reasonable. Where it is determined that sufficient competition does not exist, the Agency may solicit permission from TDHCA to enter into non-competitive negotiations or invoke sole-source.

Proposals that contain false or misleading statements may be rejected if, in the Agency's opinion, the information was intended to mislead the Agency regarding a bid requirement.

## **SECTION FIVE: Proposal Submission Instructions**

One original with two copies of the bid must be submitted no later than 5:00 p.m. on August 23, 2017. Proposals received after that date will not be considered. It is the responsibility of the submitting entity to ensure that the proposal is received by the Agency by the deadline. The Agency will not be responsible for the US Postal Service or Delivery Services failure to deliver the proposal by the due date and time. Sealed proposals should be mailed or delivered to: 604 High Tech Drive Georgetown, TX 78626

Proposals may not be emailed or faxed. All proposals must be submitted in a sealed envelope clearly marked on the outside "**SEALED BID, DO NOT OPEN**".

All costs incurred in the preparation of the proposal responding to this solicitation will be the responsibility of the submitting entity and will not be reimbursed by the Agency.



## **SECTION SIX: Proposal Reviews**

Sealed proposals will be publicly opened at the Agency Administrative office located at  
604 High Tech Drive Georgetown, TX 78626

At: 9:00 a.m. On: August 24, 2017.

All proposals will be evaluated, based on a point system, by a committee appointed by the Agency Executive Director, or their assigns. Efforts will be made by the Agency to utilize small businesses and minority-owned businesses. The Agency will not discriminate regarding race, color, creed, sex, religion, national origin, disability, marital status, parenthood or age.

The Agency reserves the right to award the contract to the submitting entity whose proposal is most advantageous to the Agency, regardless of scoring results.

## **SECTION SEVEN: Award Notification**

Upon conclusion of final negotiations with the successful submitting entity, all entities submitting proposals in response to this Proposal Solicitation will be informed in writing of the name of the agency with the winning submission.

## **SECTION EIGHT: Protests**

All protests regarding the solicitation process must be submitted in writing to the Executive Director within (5) five business days following the opening of the proposals. Failure to protest within the time frame will constitute a waiver of protest.





**OPPORTUNITIES**  
for Williamson & Burnet Counties  
Paths to Independence  
**SECTION NINE: Scoring**

- A. Experience providing ROMA Training to small business or corporations (30 points)
- B. Experience providing training to (30 points)
  - 1. Front Line Case Management Staff
  - 2. Management Staff
  - 3. Boards
  - 4. Support and Other Program staff
- C. Description of training methods and tools that have proven to be successful for you in delivering ROMA Training. (30 points)
- D. Description of tools, activities and communication that enable your team to be successful in working with organizations on an ongoing basis regarding ROMA. (30 points)
- E. Fees (30 points)
- F. Non-fee costs (30 points)

Overall value of proposal toward meeting the Agency's needs (20 points)



## **SECTION NINE: Questions**

Inquiries concerning this Proposal Solicitation should be directed to Denise Schilli at 512-763-1400 or emailed to [dschilli@opportunitiesforwbc.org](mailto:dschilli@opportunitiesforwbc.org). Deadline for inquiries is 5:00 p.m. on August 17, 2017.

## **SECTION TEN: Preferences**

The Agency prefers proposals that include:

- Fees and costs that are based on calculable data such as hours, miles, or fixed costs. (Costs must be reasonable, allowable, and allocable with regard to federal regulations.)
- The use of Certified Master ROMA Trainers
- The use of Certified Community Action Professionals
- The use of personnel who have worked within the Community Action Network
- The use of Calibri 12pt font (no smaller)
- The use of bookmarks in a PDF document to organize the proposal