



Ohio Manufacturing Extension Partnership Program

Program Years 2017-2021

Request for Proposals (RFP)

RFP Timeline:

- RFP Released – May 16, 2016
- Letters of Intent due by 1:00 p.m. on June 1, 2016
- Written questions accepted through July 1, 2016
- Proposals due by 1:00 p.m. on July 15, 2016
- Cost Share commitment letters due by 1:00 p.m. on September 1, 2016
- Review and Award approximately September 30, 2016



Manufacturing Extension Partnership

RFP Administered by:

The Ohio Development Services Agency
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Ohio Manufacturing Extension Partnership Program

Program Years 2017-2021

Request for Proposals

1 Statement of Solicitation

1.1 Overview

This Request for Proposals (“RFP”) is intended to identify and select the organizations that will serve as regional affiliates to deliver Manufacturing Extension Partnership (MEP) services to manufacturing businesses throughout the state of Ohio, with a particular emphasis on serving small to mid-sized manufacturing enterprises. MEP in Ohio is jointly funded by the State of Ohio (“State”) and by the US Department of Commerce, National Institute of Standards and Technology (NIST).

1.2 Background

Since 1988, the Hollings Manufacturing Extension Partnership (MEP) has been committed to strengthening U.S. manufacturing, continually evolving to meet the changing needs of manufacturers.

MEP’s strategic objective is to create value for all manufacturers, with a particular focus on small and mid-sized manufacturing enterprises (SMMEs). SMMEs represent nearly 99% of manufacturing firms in the U.S. and form the essential fabric of the U.S. manufacturing infrastructure. MEP is able to provide this support to individual manufacturers through its nationwide network of local centers made up of teams of experts and business professionals.

Through its collaborations at the federal, state and local level, MEP puts manufacturers in a position to develop new products and customers, expand into global markets, adopt new technology, re-shore production, and more. Because of its direct contact with manufacturers, MEP serves as a valuable bridge to other organizations that share a passion for enhancing the manufacturing community.

For more information about the Hollings Manufacturing Extension Partnership, visit <http://www.nist.gov/mep/>.

The Ohio Development Services Agency (“DSA”) currently operates MEP in Ohio under a multi-year agreement that is up for renewal in October 2016. DSA has applied to once again administer MEP for the state for a new five-year period beginning on or about October 1.

To serve the diversity of Ohio's industrial base, Ohio MEP manages a network of regional affiliate service organizations, which are designated as grant sub-recipients. These affiliates are aligned with a statewide strategy that connects Ohio MEP with other state and regional economic development organizations and the university system.

Ohio MEP's regional affiliates are strategically selected and coordinated to serve as a statewide resource that meets the needs of key industry sectors and small manufacturers. Each of the affiliates also offers technical capabilities that align with the predominant industry clusters in the primary region it serves. These resources are available to other regions of the state as Ohio MEP strives to operate as a cohesive statewide organization under the theme of "One Ohio MEP".

Coincident with the federal program renewal, DSA is conducting an open competitive bid and award process that seeks the most capable organizations to serve as regional affiliates for the MEP program for the new five-year contract period.

1.3 Request for Proposals Issuance

This RFP is being issued for funds to be awarded under the Ohio Manufacturing Extension Partnership Program ("Program"). This RFP will be released by publication on the State of Ohio Procurement website at <http://procure.ohio.gov/proc/index.asp> and the Ohio Development Services Agency website at https://development.ohio.gov/bs/bs_mep.htm.

DSA reserves the right to fund any proposal in full or in part, to request additional information to assist in the review process, to reject any or all proposals responding to this RFP, and to re-issue the RFP and accept new proposals if the Director of DSA ("Director") determines that doing so is in the best interests of the state.

Issuing this RFP does not bind the State to make an award of funds. Availability of funding is contingent on award to DSA by the US Department of Commerce, National Institute of Standards and Technology of a contract to operate the Program for the state, and the subsequent appropriation of Federal funds. Any award of State funds in respect to this RFP is subject to the availability of funds as provided in Ohio Revised Code Section 126.07. This RFP is not a contract or commitment of any kind on the part of DSA.

DSA reserves the right to adjust the dates for this RFP for whatever reason it deems appropriate. DSA's Office of Small Business and Entrepreneurship will administer all funds awarded under this RFP.

1.4 RFP Process and Awards Process

The RFP process will consist of the following steps:

- Release of RFP
- Letters of Intent
- Questions and Answers (Q&A) and Communications
- Submittal of Proposals

Each of these steps is discussed in Appendix A – RFP Process, Awards and Mandatory Compliance.

In addition, DSA anticipates scheduling an informational webinar for interested organizations; the date, time and access information for the webinar will be posted on the DSA website shortly after the release of the RFP.

The Awards Process will consist of the following steps:

- Proposal Review and Evaluation Procedures
- Award Decision
- Award and Agreement Preparation and Execution

Each of these steps is discussed in Appendix A – RFP Process, Awards and Mandatory Compliance.

All questions regarding this RFP must be submitted in writing via e-mail to MEPRFP@development.ohio.gov with a subject line of “2016 RFP Q&A”. Lead Applicants, Partners, Clients and/or others acting on their behalf are to be aware of all prohibited contact in Section IV of Appendix A – RFP Process, Awards Process and Mandatory Compliance. If a Lead Applicant, Partner, Client and/or others acting on their behalf makes prohibited contact, DSA in its discretion may eliminate the associated proposal from consideration.

2 Program Description

2.1 Purpose

The purpose of the Program is to support the state’s manufacturing industry by providing products, services and assistance that drive the productivity, growth and global competitiveness of Ohio manufacturers.

In 2012, DSA reorganized and expanded Ohio MEP into a coordinated matrix organization under the umbrella concept of “One Ohio MEP”. The expansion enabled a regional service delivery model that offers assistance through regional affiliate organizations and their networks of "Under 50" partners, which work primarily with manufacturers employing 50 or fewer workers. The capabilities and attributes of the affiliates, from business to science and academia, represent the broad geographic, technical and market diversity that describes Ohio’s manufacturing economy.

2.2 Goals

The principal goals of the Program for 2017-2021 are to increase revenue, create jobs and generate cost savings for Ohio’s manufacturing businesses through technological innovation and improved management practices. The Program will accomplish these objectives by designing and delivering services that:

- Lower the barriers for small and mid-sized manufacturing enterprises (SMMEs) to:
 - Learn and implement cutting edge process innovation and continuous improvement techniques
 - Export by partnering with export promotion organizations and agencies
 - Adopt digital manufacturing technologies
 - Adopt technologies that rejuvenate existing products
- Improve the competitive position of Ohio’s SMMEs in domestic supply chains of major original equipment manufacturers (OEMs)
- Promote job opportunities by supporting internships and cooperative education, and serving as a voice for industry to the workforce system
- Support SMMEs located in disadvantaged regions, including both rural and inner-city Ohio
- Support minority-owned and woman-owned enterprises
- Collaborate with federal laboratories and other sources of technology-based innovation to encourage technology-push product development; and
- Build competitive, high value-added industry clusters through a network of affiliates that have specialized knowledge in those industries.

DSA seeks to select the combination of regional affiliates that together will constitute the most effective network for meeting these objectives and delivering high quality MEP services to all of Ohio.

2.3 Eligibility

2.3.1 Lead Applicant

A Lead Applicant is the entity that submits a proposal and will be legally and financially responsible for the administration of any resulting award of federal or State of Ohio funds (“Lead Applicant”). The Lead Applicant will be responsible for the performance of the contract should it be awarded.

To be eligible for the Program, the Lead Applicant must be a non-profit organization chartered in the State of Ohio. For the purpose of this RFP, non-profit organizations include public or private non-profit corporations, non-profit or State colleges and universities, public or non-profit community and technical colleges, and local governments.

Proposals are sought from Lead Applicants and their partners to provide MEP services in one or more of the following regions:

- **Northwest Ohio** (composed of the counties of Allen, Auglaize, Defiance, Fulton, Hancock, Hardin, Henry, Lucas, Mercer, Ottawa, Paulding, Putnam, Sandusky, Seneca, Van Wert, Williams, Wood and Wyandot)
- **Northeast Ohio**
 - **Upper** (composed of the counties of Cuyahoga, Erie, Geauga, Huron, Lake, Lorain and Medina)

- **Lower** (composed of the counties of Ashtabula, Ashland, Carroll, Crawford, Columbiana, Holmes, Mahoning, Portage, Richland, Summit, Stark, Trumbull, Tuscarawas and Wayne)
- **Southeast Ohio** (composed of the counties of Adams, Athens, Belmont, Coshocton, Gallia, Guernsey, Harrison, Jackson, Jefferson, Lawrence, Meigs, Monroe, Morgan, Muskingum, Noble, Pike, Scioto, Vinton and Washington)
- **Central Ohio** (composed of the counties of Delaware, Fairfield, Fayette, Franklin, Hocking, Knox, Licking, Logan, Madison, Marion, Morrow, Perry, Pickaway, Ross and Union)
- **Southwest Ohio** (composed of the counties of Brown, Butler, Clermont, Clinton, Hamilton, Highland and Warren)
- **West Central Ohio** (composed of the counties of Champaign, Clark, Darke, Greene, Miami, Montgomery, Preble and Shelby).

Please note: Lead Applicants who are contemplating bids for more than one service region are strongly urged to team with a highly qualified Partner (see section 2.3.2 below) that is based in the additional region(s). Lead Applicants for the Northeast Ohio region should supply a bid that explicitly addresses both the Upper and Lower counties; however, highly qualified proposals covering only the Upper or only the Lower counties will be considered. Proposals that cover more than one sub-region or region should be organized so as to address each individually with respect to sections 3.4.5.1, 3.4.5.2, 3.4.5.5 and 3.4.6.2 below.

2.3.2 Partners

DSA defines a Partner as an organization, institution, company or other legal entity that is not an affiliate of the Lead Applicant or an individual not employed by or related to the Lead Applicant that is anticipated to receive MEP funds and/or is contributing to cost share, and is actively involved in the delivery of services on an ongoing basis (“Partner”).

To be eligible for the Program, a Partner must be a non-profit organization chartered in the State of Ohio. For the purpose of this RFP, non-profit organizations include public or private non-profit corporations, non-profit or State colleges and universities, public or non-profit community and technical colleges, and local governments.

All Partners and/or cost share providers must be listed on the Partner Information Form in Appendix B – Application Forms and provide Commitment Letters as described in section 3.4.7 Commitment of this RFP.

2.3.3 Clients

A Client must be a business with a manufacturing facility located in Ohio, and managed by a senior representative who is authorized to make decisions and to obligate the company and its resources (“Client”).

To be considered a Client, the company must have signed a service agreement with the Lead Applicant and/or Partners and received a minimum of 20 documented

hours of services from the Lead Applicant, Partners, or professional service firms contracted on behalf of the Client. A company does not become a Client upon the initiation of the sales or business development process, or attendance at a training or similar general education event.

At the time of becoming a Client, the company is expected to be in need of manufacturing-specific professional assistance that is aligned with the goals of the Program. Affiliates will be expected to refer potential Clients in need of generalized business services to alternative resources such as the Small Business Development Centers.

2.4 Funding and Cost Share

2.4.1 Overall Budget

Ohio MEP is funded through three sources: a grant from the US Department of Commerce (NIST), general revenue funds from the State of Ohio, and local cost share contributed by the affiliates from their clients and their sponsors. DSA anticipates awarding up to \$56.2 million in federal and State funds through the Program to the regional affiliates (up to \$11.25 million each per year) for Program Years 2017-2021 beginning on October 1, 2016 (refer to Section 2.5). DSA reserves the right to award greater or lesser amounts and/or to shift the allocation of funds among grantees if it determines that this best serves the interests of the Program.

Instructions for generating and submitting budget forms are provided in section 3.4.6.

2.4.2 Federal Funds Allocation

NIST anticipates awarding approximately \$5.25 million each year to Ohio for the performance of the Program. DSA has committed to flow this entire amount through to the regional affiliates. Yearly federal funding will be allocated to the regions identified in section 2.3.1 as follows:

- Northwest Ohio - \$749,546
- Northeast Ohio
 - Upper - \$924,440
 - Lower - \$924,440
- Southeast Ohio - \$549,667
- Central Ohio - \$499,697
- Southwest Ohio - \$899,455
- West Central Ohio - \$699,576

2.4.3 State Funds Allocation and Cost Share

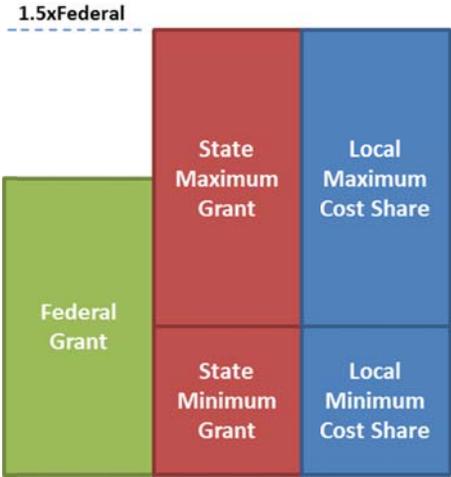
Per Ohio Revised Code 122.33, recipients of State funds under the Program must contribute matching funds that equal or exceed the amount of the State grant. MEP is unique among federally sponsored programs in its ability to generate matching

funds by charging clients for services performed, creating Program Income as defined in 2 CFR 200.80.

The primary intent for the use of State and federal funds in the Program is to make high quality professional services affordable and accessible to small and mid-sized manufacturers. With a significant fraction of the costs of operating the Program supported in this manner, the regional affiliates and their partners are able to field a much higher level and quality of resources at lower billing rates than if the Program had to rely on fee-for-service income and local sponsorships alone for financial support.

DSA aims to provide funding support to individual affiliates in the range of 55% to 75% of total Program costs, with a target funding contribution ratio of 1:1:1 (federal:state:local) for the overall Program. Affiliates are required to provide their portion of funding through a cost-sharing arrangement. A minimum of 90% of local cost share must be in the form of cash, generated from program income or sponsorships. Up to 10% of local cost share may be in the form of “in-kind”, high-value services donated to Clients by third-party professional services firms. Examples of these services include legal, tax, accounting and marketing, with a documented number of hours spent with Clients at hourly rates that are verifiable and auditable. Other forms of in-kind cost share such as donated equipment, facilities or personnel are not allowable.

Lead Applicants must propose a base budget consisting of a minimum of \$0.50 State grant funding plus \$.50 local match for each \$1 of Federal grant funding, and a maximum of \$1.50 of State grant funding plus \$1.50 of local match for each \$1 of Federal grant funding, as shown in the figure below. Each Lead Applicant may also request additional State grant funding up to 10% above their base budget for creative, high-value projects in support of the Ohio manufacturing sector but outside of the lines of business listed in the next section. Projects in this category will be competitively selected and will be subject to a 1:1 cost-share and the availability of State funding.



2.4.4 Performance-Based Cost Match

For the MEP five-year renewal, DSA will implement a performance-based methodology for development and management of budgets and reimbursements. This approach will incentivize a strong emphasis on the delivery of accessible, affordable, high-quality consulting services to small and medium-sized manufacturing businesses.

DSA will employ a matching formula for cost reimbursement that recognizes the contribution of each line of business to the program as well as its ability to generate program income. Each consulting line of business will report its professional services hours, rates and fees-for-service by project – this information is already required by NIST for the MEIS report. For lines of business that are supported by community contributions or sponsorships, the amounts of cash generated and the professional services hours by employee will be reported for each.

A matching grant calculation will be performed in accordance with the following provisional rates:

Line of Business	Matching Grant Share	Local Cost Share	Multiplier on PI/Other Cash
Very small business consulting services (fewer than 25 employees)	75%	25%	3.00
Small-to-medium sized business consulting services (25-800 employees)	65%	35%	1.86
Large business consulting services (more than 800 employees)	15%	85%	0.18
New services and technology development	50%	50%	1.00
Workforce/education/training events & memberships	60%	40%	1.50

Allowable invoiced costs will be reimbursed for a given period at the budgeted cost share ratio up to the level determined by the matching formula. As appropriate, unreimbursed costs, excess matching grant funds and unexpended program income will be carried over to the next period. In no case will an affiliate’s reimbursements in a program year exceed the budgeted total of federal and State cost share dollars for that affiliate.

Applicants are strongly encouraged to design a business plan with a mix of business that generates program income commensurate with the resources that are applied to each line of business.

2.5 Term of Project

The Project is the plan of activity or activities that make up the total scope of work for which an award of Program funds is requested and for which a proposal is approved. The Project Period during which the active work funded by the grant shall be no more than five years, from October 1, 2016, until September 30, 2021. Continued participation in the Program during each year of the Project Period will be subject to continuing acceptable performance, determined at the sole discretion of the Director, and the availability of funding.

NIST has indicated the possibility that federal awards under this Program may be extended without competition for an additional five years beyond the initial five years contemplated in the renewal. Should that extension be granted, the Director may elect to similarly extend the Project Period without competition for any or all awardees for up to five additional years.

3 General Proposal Requirements

3.1 General Instructions

Interested, eligible organizations must register at DSA's online submission portal. The portal can be found at <https://development.ohio.gov/MEPApp/>. Registration is open as of the release of this request for proposal. Successful registrants will receive an acknowledgment email.

Organizations intending to submit a proposal must first submit a Letter of Intent (LOI) through the online portal no later than 1:00pmET on June 1, 2016. LOIs will be no more than two pages in length and must be on the organization's letterhead and signed by an executive authorized to commit the organization. LOIs will be submitted as single, readable PDF files. In the event that the portal is unavailable, LOIs may be submitted via email to MEPRFP@development.ohio.gov with the subject line "MEP Letter of Intent". Applicants who successfully submit an LOI will receive an acknowledgment email with an LOI number that will serve as an identifier for the submission of a full proposal.

Eligible Lead Applicants who have submitted an LOI before the submission deadline, and who have been issued an LOI number, will be permitted to submit full proposals. Full proposals must be submitted in the following manner:

- Proposals will be submitted electronically by uploading them to the submission portal. Proposals will consist of a written narrative, submitted as a single readable PDF file, plus a set of budget forms, one set for each region/sub-region proposed. The budget forms should remain in Excel format for submission. In the event that the portal is unavailable, proposals may be submitted via email to MEPRFP@development.ohio.gov with the subject line "MEP Proposal Submission".
- It is the Lead Applicant's responsibility to ensure submission of a complete proposal based on all requirements of this RFP.

- Proposals are to be submitted in 8½ x 11-inch format, portrait orientation. Budget forms may be in landscape orientation if needed for legibility.
- Margins must not be less than ¾ of an inch on all sides, with the exception of forms found in the Appendices.
- Font must be 11 pt. or larger with no more than 6 lines per inch. Figures, tables and other exhibits may use smaller fonts as long as they remain legible.
- The first page of the proposal must be the Application Information Page found in Appendix B – Application Forms.
- All pages must be numbered consecutively using the format “Page [#] of [total number of pages]” (e.g., Page 2 of 25).
- The proposal title and Lead Applicant name must appear at the bottom of each page.
- Proposals should not include color figures that cannot be understood when rendered in black and white.
- Do not include a cover or cover letter other than the Application Information Page.

3.2 Page Limitations

Any pages beyond the page limits listed below will be eliminated from the proposal before it is accepted for review and evaluation. Except as otherwise noted, appendices or other methods to augment the information presented in the proposal are not allowed. References to web-based information to supplement the proposal are not permitted, and such references will not be considered in the evaluation.

- Abstract – 1 page
- Table of Contents – 1 page
- Project Narrative – Up to 20 pages (up to 25 pages if proposing to serve multiple regions/sub-regions)
- Qualifications of the Applicant – Up to 8 pages
- Budget Narrative – Up to 5 pages
- Budget – Use specified forms; if Applicant is proposing to serve more than one region or sub-region, a separate budget is required for each
- Lead Applicant and Partner Organization Case Histories – Up to 2 pages
- Resumes of Key Personnel – 1 page each, up to 5 total
- Letters of Commitment – Maximum of 1 page per letter

3.3 Trade Secret Information

All Lead Applicants are strongly discouraged from including in a proposal any information that the Lead Applicant considers to be a “trade secret,” as that term is defined in Section

1333.61(D) of the Ohio Revised Code. All information submitted in response to this RFP is public information unless a statutory exception exists that exempts it from public release under the Ohio Public Records Act in Section 149.43 of the Ohio Revised Code. If any information in the proposal is to be treated as a trade secret, the proposal must:

- Identify each and every occurrence of the information within the proposal with an asterisk before and after each line containing trade secret information and underline the trade secret information itself.
- Check the “This Application Does include information considered a ‘trade secret’” box on the Applicant Information Page.
- Include a page immediately after the Application Information Page that lists each page in the proposal that includes trade secret information and the number of occurrences of trade secret information on that page.

To determine what qualifies as trade secret information, refer to the definition of “trade secret” in the Ohio Revised Code at 1333.61(D), which is reproduced below for reference:

“Trade Secret” means information, including the whole or any portion or phase of any scientific or technical information, design, process, procedure, formula, pattern, compilation, program, device, method, technique, or improvement, or any business information or plans, financial information, or listing of names, addresses, or telephone numbers, that satisfies both of the following:

- (1) It derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
- (2) It is the subject of efforts that are reasonable under the circumstances to maintain its secrecy.

DSA requires all non-DSA persons who may have access to proposals containing trade secret information, including evaluators, to keep this information confidential.

3.4 Order and Content of Proposal Sections

Unless otherwise noted, the proposal must address all of the elements listed in this section, and in the order requested.

3.4.1 Application Information Page

The first page of the proposal must be the completed Appendix B – Application Forms.

This section of the proposal must disclose any trade secret information included in the proposal. Follow the instructions in Section 3.3 of this RFP regarding trade secret information.

3.4.2 Abstract

Prepare an abstract that summarizes the Lead Applicant's strategy and work plan. This section will be used in public documents, including press releases, and must be understandable by the general public. Minimize the use of jargon and technical language and write it so that a non-technical person can understand it. **The abstract must not contain any trade secret information.**

3.4.3 Table of Contents

Prepare a Table of Contents with detail for all levels of headings requested in this RFP.

3.4.4 Project Narrative

3.4.4.1 Strategy

Describe the organization's proposed strategy for delivering services that meet manufacturers' needs, generate client impacts (e.g., cost savings, increased sales, etc.), and support a strong manufacturing ecosystem, including:

- Balancing market penetration with impact and revenue generation;
- Addressing the overall needs of manufacturers, with an emphasis on small and medium-sized manufacturers;
- Leveraging relationships with other entities in the state's manufacturing ecosystem, including State, regional, and local agencies, economic development organizations and educational institutions such as universities and community or technical colleges, industry associations, and other appropriate entities;
- Engaging with other entities in statewide and/or regional advanced manufacturing initiatives; and
- Supporting achievement of the MEP mission and objectives while also satisfying the interests of other stakeholders, sponsors and partners.

3.4.4.2 Market Understanding

Describe the key characteristics, opportunities and challenges of the manufacturers in the proposed service region(s). Provide a high level analysis based on segmentation by company size, geographic distribution and industry focus, including consideration of rural, start-up (a manufacturing establishment that has been in operation for five years or less) and very small manufacturers as appropriate. An excerpt from a recent segmentation analysis of the Ohio manufacturing sector is included for reference as Appendix C.

Discuss how this understanding drives the regional priorities for the product/service offerings that will be described in the next section.

3.4.4.3 Product/Service Offerings

Describe the mix of products and services that will be offered and how they relate to the operational improvement and growth of manufacturers (especially small and medium-sized enterprises) in the principal segments identified in the market analysis.

NIST requires each state program to address specific goals and activities for each of five Next Generation Strategy (“NG-S”) key initiatives. The five initiatives are:

- Continuous Improvement
- Technology Acceleration
- Supply Chain Optimization
- Sustainability
- Workforce Development

As applicable to the regional strategy and business model, provide the following information (table form is suggested) for each of the five initiatives:

- Current services offered
- New services to be available within the first operating year
- Lead Applicant, Partners and third-party providers staff (FTE’s) to support service delivery
- Expected number of clients and project activity for the first operating year.

If the applicant is proposing any special (“+10%”) projects above the base budget, as discussed in section 2.4.3, the scope, benefits and implementation approach should be described here.

3.4.4.4 Technology/Industry Specialization

To the extent that the Lead Applicant organization possesses targeted expertise in a specific industry or technology area, describe the relevant resources and the related service offerings that the organization is prepared to deliver on a statewide basis.

3.4.4.5 Outreach and Service Delivery to Market

Present a plan for identifying and reaching all manufacturers in the proposed service region(s) that might make effective use of MEP services. Pay particular attention to methodologies that will reach very small manufacturers or manufacturers in rural and under-served urban environments. Describe the mix of marketing, educational and other tools at the organization’s disposal to effectively execute the outreach plan. Explain how relationships with Partners or third party service providers will be leveraged to make the plan successful. Discuss the approach to collaborating with other entities to make a full range of

economic development services available to the manufacturing businesses in the region(s).

3.4.4.6 Performance Measurement and Management

NIST requires that each state MEP Center keep and report on key metrics to gauge the health and effectiveness of the Program. This information is reported by the affiliates at two levels: 1) individual project delivery through NIST's MEP Enterprise Information System (MEIS) website, and 2) impact (scorecard) data reported to Ohio MEP (DSA) and aggregated for delivery to NIST. Impact data includes new and retained sales, new investment, cost savings, new jobs and client satisfaction (e.g. "Net Promoter Score").

Generating quality impact metrics requires a healthy pipeline of client engagements, delivered at a level of activity that is sufficient to generate required program income, which is the primary component of affiliate cost share. Please provide a table showing the organization's projected results for the following metrics, quarterly for program year 2017 (October 1, 2016 through September 30, 2017), and annually for the subsequent four years:

- # of Client Engagements – Very small (<25 employees) manufacturers
- Average revenue per engagement
- # of Client Engagements – Small to medium-sized (25-800 employees) manufacturers
- Average revenue per engagement
- # of Client Engagements – Large (>800 employees) manufacturers
- Average revenue per engagement
- Total engagement revenue
- # of workforce/education/training events
- Total revenue from workforce/education/training events and memberships

Discuss the organization's approach to establishing and maintaining long-term client relationships needed to collect meaningful impact data for the Program over a multi-year post-engagement tracking interval.

3.4.5 Qualifications of the Applicant

3.4.5.1 Experience

Provide a brief history of the Lead Applicant's organization, its mission and its relationship to the delivery of manufacturing-specific professional services to businesses. Provide similar information regarding any Partners. Using Appendix C, relate up to five case histories that illustrate the organization's experience in delivering these kinds of services to manufacturing businesses in Ohio, placing particular emphasis on projects for small and mid-sized manufacturing enterprises. Case histories should be 150 words or fewer, indicating the type of manufacturing firm, industry, project scope, year of performance and (quantifiable) results.

3.4.5.2 Organizational Structure and Management

Describe the proposed management structure and roles that will permit the organization to plan, organize, sell and deliver MEP services to manufacturers in the service region(s). Discuss the roles of Partners and third-party providers in delivering these services. Show how the proposed field staff structure and physical location of resources sufficiently supports the geographic concentrations of manufacturers and industry targets for the service region(s). Describe the project management system and ability to track schedules, milestones, costs and professional services hours on a project-by-project basis.

3.4.5.3 Key Personnel

Briefly describe the relevant qualifications of three to five key individuals at the Lead Applicant/Partner(s) who will execute the strategy laid out in the proposal to meaningfully advance the regional manufacturing base and serve the Client companies. One-page resumes for each individual cited may be provided in an appendix, which will not count against the page limit. Discuss their track records in working with manufacturing companies, especially small and mid-sized businesses, and delivering manufacturing-specific technology and management consulting services. Discuss their abilities to lead or meaningfully contribute to a program of this scope and complexity.

3.4.6 Budget

Please see Section 2.4 for additional information.

The budget must clearly describe all sources and uses of funds for the proposed Project Period. The Lead Applicant will provide a detailed budget and related explanations that are consistent with the level of resources being requested. In preparing the budget, the Lead Applicant must use the applicable budget forms contained in Appendix E – Budget Forms.

Please note that both NIST and DSA require participation in events and activities that are important to the program, but which do not generate program income. These events include:

- Quarterly leadership meetings
- Representation on regional business assistance center advisory teams
- Annual Ohio MEP summit
- Occasional travel to DC for training and joint events
- Overhead projects, e.g. NIST mandates, working groups
- Monthly/Quarterly reports

It is expected that these types of “overhead” activities will be accounted for within the cost categories that comprise the indirect rate calculation for each organization.

3.4.6.1 Budget Narrative

Provide a detailed explanation of the sources and uses of funds for (i) the State and federal funds requested and (ii) cost share committed. The uses of funds and the scope of activities must be clearly and fully described for each line item. Provide a revenue budget for each line of business. Be very specific regarding “Other Direct Costs”. Describe the principal full-time and part-time positions to be supported with Program funds and the role of each in the Program.

3.4.6.2 Cost Share

Describe the sources and level of cost share. The cost share commitment must be at least one dollar for every dollar of State funds requested (i.e., a ratio of 1:1). All cost share must be identified in the proposal by amount, proposed use and source, and documented in the Budget Forms. Commitment letters are required from each organization contributing cost share and must be signed by a representative authorized to commit the organization to the proposed Project and the cost share described. Organizations contributing cost share in the form of donated services must complete both a Commitment Letter and the Donated Services Provider Information Form included in Appendix B – Application Forms. The cost share must represent a specific new commitment, including the dollar amount or value, to the Program described in the proposal. Resources that have already been designated as cost share for another award or a different instance of this Program may not be used as cost share for this Program award.

A Lead Applicant may bid both current and future cost share commitments. The use of future cost share commitments is limited to those potential funders with unique budget process and cycles. A description of the relevant budget cycle and timing of the funding announcement must be included in the commitment letter. Commitment letters that do not include the cost share amount and the use of funds or are not on the cost share provider’s official letterhead and signed by an authorized representative will not be considered. All cost share commitments for the first year of the Program must be current by the time the Grant Agreement with DSA is executed.

Cost share must be used directly in support of the Program and not for coincidental or related/similar allocations. Cost share must be necessary and directly allocable to activities that support the Program objectives. Any activity or expense incurred that is not eligible for reimbursement under State of Ohio expense policy may also not be applied to cost share.

Other federal or State of Ohio funding may not be used as cost share for this Program, and funds awarded under this RFP may not be used as cost share against other activities funded by the State or federal governments. All expenses of cost share must take place during the Program accounting period for which matching funds are sought. Cost share must be for allowable costs that are verifiable and auditable, and must be documented within the financial records of the Lead Applicant. All cost share is subject to audit.

3.4.6.3 Budget Forms

Budget Forms may be found in Appendix E. Please note that Budget Forms are to be submitted as attachments separate from the written proposal, one set for each region/sub-region proposed.

Budget Form 1 – Lead Applicant Budget is to be used by the Lead Applicant. The total State and federal funds requested in the proposal must be represented on this form as the grant amounts that will be used by the Lead Applicant and Partners. The Subcontract/Sub-grant line on this form refers to the funds provided to Partners by the Lead Applicant or cash cost share provided by Partners.

In support of the One Ohio MEP concept, affiliates are encouraged to make use of the expertise resident in other regional affiliates when this expertise can lead to a better outcome for a Client. Therefore, DSA will include a transfer pricing provision as part of allowable costs as follows: when an affiliate uses another Ohio MEP affiliate as a third party service provider, the affiliate acting as the prime contractor may take the indirect cost that would normally be associated with the subcontract as cost share credit.

Indirect Costs are allowable. An Indirect Cost is a cost that is incurred for common or joint activities and therefore cannot be identified readily and specifically with a particular sponsored project but nevertheless is necessary to the operation of the organization. These costs are also known as “Facilities & Administrative (F&A) costs”.

For applicants with indirect rates approved by a “cognizant federal agency”, the State will accept the approved or provisional rates for use in calculating fully loaded costs. The Indirect Cost Negotiation Agreement letter or similar document from the cognizant agency documenting the approved rates for federal FY2017 must be included with the proposal. For Lead Applicants without federally approved indirect rates, a 2 CFR-200-compliant rate application must be submitted with the proposed budget. A well-written guide for generating a compliant indirect rate calculation may be found at <http://www.dol.gov/oasam/boc/DCD-2-CFR-Guid-Jan2015.pdf>. Upon approval by the State, these indirect rates will be applied for the Program year. All costs are subject to reconciliation if provisional rates have been used. Complete financial records are expected to be kept, and will be subject to audit.

Grant funds may not be expended, except as Indirect Costs, for facility maintenance or operations. Grant funds may not be expended for property acquisition or lease, physical infrastructure improvements or renovations, or the purchase or lease of capital equipment, except as expended through depreciation within the Indirect Cost pool.

Budget Form 2 – Partner Budget is to be completed for each Partner that is receiving a Subcontract/Sub-grant and/or is committing cost share to the

proposed Project, and is actively involved in the delivery of services on an ongoing basis. The total of the requested State and federal funds and related cost share detailed on Budget Form 2 must equal the total corresponding amounts of the Subcontract/Sub-grant line reported in Budget Form 1.

Budget Form 3 – Source of Cost Share requires the Lead Applicant to report the sources and type of cost share by entity from itself and all Partners. A Letter of Commitment on the cost share source's letterhead, signed by an authorized representative, must support each cost share amount claimed. In addition, any entity providing donated services as cost share must complete and submit the Donated Services Provider Information Form found in Appendix B – Application Forms. Please note that the Lead Applicant accepts full responsibility for securing and delivering the cost share commitments. Such acceptance must be documented by the Lead Applicant in the commitment letter, specifically stating that the Lead Applicant understands and accepts this responsibility.

The Lead Applicant is solely responsible to have adequate funds to cover all expenses not covered by the Ohio MEP funds awarded.

Budget Form 4 – Payroll & Fringe is to be completed for both the Lead Applicant and Partners. Identify each full-time and part-time position to be supported with Program funds, the percentage of staff time dedicated to MEP services to Clients, and the associated compensation.

3.4.7 Commitment Letter

A commitment letter must be provided for each cost share provider identified in Budget Form 3. Commitment letters may not be more than one page and may not include appendices or attachments except for those that include a Donated Services Provider Information Form. Although they are requested to be delivered with the Proposal, note that commitment letters may be submitted separately. Commitment letters are due in any case no later than 1:00 p.m. on September 1, 2016. No contract under this RFP will be concluded without commitment letters from all proposed Partners, and Lead Applicants who have been selected for the Program may be disqualified if commitment letters are not provided by that date and time.

The letters must:

- Be submitted on the letterhead of the cost share provider;
- Include the name of the Lead Applicant and the LOI number assigned by DSA;
- State the specific amount of the cost share commitment that matches the cost share amount on the corresponding Budget Forms, and the type of cost share (cash or donated services);
- Briefly state the nature and the duration of the relationship;

- State the magnitude of the Program funds anticipated to be received as part of this proposal and how the proposed services will contribute to the overall strategy of the regional MEP network, if the collaboration involves the delivery of services;
- State when the committed cost share will be available to the Lead Applicant;
- State any resources other than cost share that the cost share provider is committing to the Lead Applicant, if applicable; and
- Be dated and signed by a representative of the cost share provider with the authority to make the cost share commitment.

Organizations providing donated services as cost share must complete the Donated Services Provider Information Form which includes the number of hours committed, cost per hour, description of the services to be provided, and the total monetary value of the commitment.

General support letters are not allowed. Any such letters submitted will be removed from the proposal and not transmitted to the evaluation team.

4 Evaluation Criteria

Only the most meritorious proposals are sought for funding. Proposals will be evaluated based on responsiveness to all of the requirements of this RFP and on the Lead Applicant's response to any additional information that may be requested. Implicit in those requirements and evaluation criteria is the quality of the proposal and budget.

The criteria that will be used in evaluating proposals and their assigned weights are listed below.

- **Strategy and Market Understanding (10 pts)** – Degree to which the proposal exhibits a qualitative and quantitative understanding of the regional market, the needs of manufacturers (especially SMMEs), and the services they require. High-level approach for delivering these services, generating client impacts (e.g., cost savings, increased sales, etc.), and supporting a strong manufacturing ecosystem.
- **Service Offerings and Delivery (35 pts)** – Quality and capacity of the applicant's proposed products and services to foster sales growth and operational improvement in the applicant's market, with emphasis on how the applicant would leverage new manufacturing technologies, techniques and processes usable by SMMEs. Extent to which the applicant is positioned to: identify, reach and provide proposed services to key market segments and individual manufacturers in all parts of the region(s) described in the market analysis; make effective use of resources or partnerships with third parties such as industry, universities, community/technical colleges, nonprofit economic development organizations, and federal, State and local government agencies; and execute a systematic approach to measuring and managing performance.

- Qualifications (30 pts) – Depth and relevance of the Lead Applicant’s and the applicant’s team’s experience in delivering MEP or MEP-like services. Ability of the applicant’s organizational structure, management processes and governance model to deliver the program and services described in the Project Narrative. Extent to which the proposed key personnel have the appropriate experience and education in manufacturing, outreach, program management and partnership development to support achievement of the MEP mission.
- Budget and Finance (25 pts) – Extent to which the proposed financial plan is aligned to support the execution of the state and national MEP strategy over the five (5) year project plan; the proposed projections for income and expenditures are appropriate for the scale of services that are to be delivered; and the quality of financial controls is adequate to manage and measure the performance of the Program. Strength and credibility of the plan for generating program income and meeting cost-share obligations.

5 APPENDICES

A – RFP Process, Awards Process and Mandatory Compliance

B – Application Forms

C – Lead Applicant and Partner Organizations Case Histories

D – Market Segmentation Analysis – Ohio Manufacturing Sector

E – Budget Forms

F – Cost Match Calculator