

Ohio DC Participant and Employer Satisfaction Surveys RFP
Requests for Clarification and Responses

| # | Question | Response |
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| 1 | <p>Will the agency waive 2.8? “2.8 Please provide your most recent financial statements, including a statement of financial position, an annual income statement, and a balance sheet.”</p> <p>We are a privately held firm and do not release the information requested in 2.8. This information is typically required for large-scale capital improvement project contractors.</p> | No. This is required. You may provide it as a separate file and watermark it as “confidential.” It will not be privy to any public records requests. |
| 2 | While the team is working on the answers to the questions, please advise on where we fill in the information. Is it supposed to be on an Excel or Word document? | Responses are preferred in PDF. |
| 3 | Please confirm the surveys will be measuring the overall relationship between Ohio DC and the participants and employers (relationship surveys) as opposed measuring satisfaction with specific interactions following specific contacts with the service center, participant website, and meetings with Account Representatives (transaction-based surveys)? | The surveys will be measuring participant and employer satisfaction with interactions following specific contacts with the service center, participant website, and meetings with Account Representatives, as well as gauging the holistic viewpoint of participants and employers about Ohio DC as an organization. |
| 4 | Please confirm, there will be 2 surveys one for participants regardless of the method they used for contacting Ohio DC (service center, website or meetings with account reps) and one for Ohio DC employers. | That is correct. There will be two distinct surveys. One for employers and one for participants. |
| 5 | Please confirm the participants survey will be conducted semi-annually (twice per year) and the employer survey will be conducted annually. | That is correct. Surveys for participants should be totaled semi-annually (twice per year), but be conducted on a monthly basis to ensure sample sizes are met (i.e. surveys sent February, March, April, May, and totaled in June with a report presented to Ohio DC. Then, surveys sent August, September, October, November and totaled in December with |

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| | | a report presented to Ohio DC in January. Employer surveys are conducted just once per year, in the fall (surveys sent in September and October), with a report provided to Ohio DC in January. |
| 6 | What is the estimated number of participants? | Ohio DC has 260,000+ participants. Surveys will only be sent to those participants who have had recent interaction with Ohio DC's website, Service Center, or Account Representatives. |
| 7 | What are the volume of contacts by contact type (service center, website or meetings with account reps)? | Contacts by type on a per month average: Service Center – 3,000 Account Representatives – 300 Website – 2,500 |
| 8 | Are sample sizes that support a confidence level of 95% +/- 5% expected for each contact type or is that requirement for the aggregate population? | Sample sizes that support a confidence level of 95% +/-5% are expected for each contact type, if possible. |
| 9 | Is there a preferred format for the reports? PowerPoint, Word, Excel, other? | Powerpoint or PDF would be the preferred format for the overall reports presented semi-annually (or annually in the case of employer surveys). Monthly progress reports of data for participant surveys can be provided via Excel. |
| 10 | Is there a preferred format or specific line items needed for detailing the pricing for the program? | There is no preferred format or specific line items needed for detailing the pricing. |
| 11 | What is the anticipated timeline for the proposal evaluation and award process? | It's anticipated that the evaluation and award process will take place between June and July of 2025. |
| 12 | What is the anticipated time period from final selection of the vendor and the contract start date – this would be needed to specifically respond to 4.7 regarding the transition plan. | The anticipated contract start date would be approximately August 1, 2025. Depending on the onboarding process, surveys may not commence as early as August. |
| 13 | Will proposals be penalized for providing fewer than five clients of similar size – are larger clients acceptable? | If clients aren't of similar size, larger clients are acceptable. As long as there are five clients for Ohio DC to reference, there will be no penalty. |
| 14 | What is the difference between the information requested in 6.1 and 6.2? | 6.1 requests the name and contact information for the |

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| | | organization/company. 6.2 requests the contact information for an individual to whom Ohio DC can reach out for a reference check. |
| 15 | Is a sample contract required at the time of proposal submission or upon being selected for the engagement? | A sample contract is required at the time of the proposal submission. |
| 16 | Can you provide clarification in terms of the expected level of detail in the description of our company's plan for the start-up process and transition from the previous provider given our limited knowledge of the details. From our perspective there will be many details that will have to be explored and decisions to be made at the start of the program that would be included in the project plan but not available until the engagement commences. | Due to the nature of this work, the transition period may not be as burdensome as other types of services. Please provide a timeline of your traditional onboarding of new clients. |
| 17 | Please clarify the expectations for performing transition work prior to the effective date of the contract. Is the assumption that the cost of providing those services would be included in the contract to be paid once regular services begin? | Due to the nature of this work, it's anticipated that little onboarding would need to occur prior to the contract effective date. |
| 18 | How long have these surveys been conducted? | Data kept for these surveys date back to 2015. |
| 19 | Will historical data need to be incorporated into the reports? If so, how many years worth of data would need to be reflected? | Historical data for the previous five years should be incorporated into the reports. |
| 20 | Can a company that doesn't have assessments that are allowed to be publicly shared be disqualified from consideration even if they can provide references to speak to their performance? | A company that does not have assessments which can be publicly shared will not be disqualified from consideration. However, such assessments can be provided as a separate file from the main submission and watermarked as "confidential." It would not be privy to any public records requests. |
| 21 | When are the email invitations to take the survey sent to participants (i.e., periodically, or right after they contact an acct rep or use the website)? | Email invitations are to be sent periodically, in batches. Ohio DC will provide contact information via a Dropbox folder for new batches. |

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| 22 | Are invitations only sent to those who interacted with Ohio DC, or to a random sample of participants and only those who had an interaction qualify? Or, do all participants qualify? | Survey invitations are only sent to those who have recently interacted with Ohio DC through one of three means (website, Service Center, Account Representatives). Those who have been invited to participate in a survey within the past 12 months will be withheld from inclusion in a batch. |
| 23 | What is the budget for this work, or what has been spent in the past year on the study? | \$39,000 has been budgeted for satisfaction survey services in 2025. |
| 24 | Who is the incumbent vendor for the work (or has it been completed in-house using internal resources)? | Qlarity Access is the incumbent survey vendor. |
| 25 | What has been the typical sample size each 6 months for participants? | Typical participant sample size over a 6-month period by category: Service Center – 1,000 Account Representative – 100 Website – 500 |
| 26 | What has been the typical sample size for employers on an annual basis? | Typical employer sample size on an annual basis: 350 |
| 27 | Can you share the surveys used in the past? (If not, is the survey all closed-end questions)? | <p>The recent participant survey can be found here, labeled as Exhibit 1.</p> <p>The recent employer survey can be found here, labeled as Exhibit 2.</p> <p>However, Ohio DC is open to new questions and modes of questioning.</p> |
| 28 | Can you provide an example report from a prior year? | <p>An example participant report can be found here, labeled as Exhibit 3.</p> <p>An example breakout report for the individual representatives from the participant survey can be found here, labeled as Exhibit 4.</p> <p>An example employer report can be found here, labeled as Exhibit 5.</p> <p>However, Ohio DC is open to new looks, sorting of information, and analysis of the data presented in the reports.</p> |

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| 29 | What has led to this RFP (i.e., the contract expired, or a change in vendor/process is desired)? | Contract expiration has led to this RFP. |
| 30 | How many participants are served by Ohio DC? Do you have quotas across participant categories (i.e., by length of time with Ohio DC, etc.)? | Ohio DC has 260,000+ participants. However, only participants with a recent interaction with Ohio DC should be surveyed. There are no quotas across participant categories. |