



LakeCounty

Purchasing Division

<http://doingbusiness.lakecountyil.gov/>

Lake County will be accepting **only** electronic RFP submissions for Request for Proposal. Please follow the steps below to upload your electronic RFP Submission:

1. Go to www.lakecountypurchasingportal.com
2. Click on the RFP Number: 25289
3. Click on register for this bid
4. Enter your username and password
5. Under the Submittals section, you will be able to upload your RFP submittal
 - a. Click on the browse button
 - b. Navigate your computer and select the appropriate file
 - i. Multiple files can be uploaded, each file can be no more than 20 MB
 - ii. Files can also be uploaded as a .zip file
 - c. Click on save submittals
 - d. Close the browser

ALL SUBMITTALS SHOULD BE LABELED ACCORDINGLY. PLEASE USE BELOW LABEL FOR YOUR CONVENIENCE.

<u>BID/RFP No.</u> RFP #25289	Business Name: _____
<u>Buyer:</u> Matt Finstein	Address: _____
<u>Bid/RFP Description:</u> Workforce Innovation & Opportunity Act (WIOA) Artificial Intelligence Implementation and Integration of Services	Lake County ATTN: PURCHASING DIVISION 18 N. County Street – 9 th Floor Waukegan, IL 60085-4350
<u>BID/RFP Due Date*:</u> Monday, September 15th, 2025, at 2:00 p.m. CST	

*Please note: Responses are due at **2:00 p.m. local time on Monday, September 15, 2025**. Please allow sufficient time for any technical issues you may have and upload your RFP early. Please email Purchasing at purchasing@lakecountyil.gov to receive confirmation that we have successfully received your submission. Questions are due by 4:00 p.m. local time on Monday, September 8, 2025.

**Lake County, Illinois
Request for Proposals # 25289**

Workforce Innovation & Opportunity Act (WIOA) Artificial Intelligence Implementation and Integration of Services

Request for Proposal (RFP) is for the purpose of establishing a contract with a qualified firm to provide Workforce Innovation & Opportunity Act-Artificial Intelligence Implementation and Integration of Services.

GENERAL REQUIREMENTS:	Proposers are to submit electronic proposals, to be opened and evaluated in private. Submit one (1) complete electronic unprotected copy via the Lake County Purchasing Portal and one (1) redacted copy that can be used to comply with the Illinois Freedom of Information Act (FOIA). Please refer to the FOIA statute, 5 ILCS 140/1 et seq., and specifically Section 7 therein, for an explanation of the information that may be redacted.
SUBMISSION DATE & TIME:	Monday, September 15, 2025, by no later than 2:00 p.m. local time. Proposals received after the time specified will not be opened.
CONTACT / QUESTIONS:	All contact and questions regarding the Request for Proposal shall be with the Purchasing Division. Should the proposer require additional information about this RFP, please submit questions on our website at http://lakecountypurchasingportal.com by selecting the RFP number and addendum link. Questions may also be submitted via email to purchasing@lakecountyil.gov . All questions shall be submitted no less than seven (7) days prior to the RFP opening date.
CONTENTS:	The following sections, including this cover sheet, shall be considered integral of this solicitation: <ul style="list-style-type: none">*General Terms and Conditions*Insurance and Bonding Requirements*Special Terms and Conditions*General Information*Scope of Work*Submittal Requirements*Evaluation Criteria*Proposal Price Sheet*Addendum Acknowledgement*General Information Sheet*References*Sustainability Statement*Vendor Disclosure Statement*Vendor Certification*Attachments/Exhibits

NOTE TO PROPOSERS.: Any and all exceptions to these specifications **MUST** be clearly and completely indicated in the Proposer's response to the RFP. Failure to do so may lead the County to declare any such term non-negotiable. Proposer's desire to take exception to a non-negotiable term will not disqualify it from consideration for award.

I. GENERAL INFORMATION

A. INTENT

Lake County Workforce Development is issuing this Request for Proposals (RFP) to identify and partner with qualified firms or vendors capable of delivering comprehensive Artificial Intelligence (AI) solutions that align with the department's strategic priorities. The goal is to enhance local workforce capabilities, streamline operations, and responsibly integrate AI technologies into workforce systems and business practices.

Proposed Services Should Include:

- Deployment of **AI-driven tools** to support workforce and employer services
- **Foundational training modules**, offered in both onsite and hybrid formats
- **Hands-on workshops** for practical application and skills development
- **100 hours of dedicated consultation** to support local businesses in AI adoption
- Use of **industry-relevant case studies** to demonstrate real-world impact
- Development of **AI career pathways** to guide job seekers toward in-demand occupations
- **Micro-credentialing opportunities** to validate AI competencies
- **Train-the-trainer models** to ensure sustainability and internal capacity building
- **Recorded instructional content** to extend training access and reinforce learning

Intent:

- Explore **scalable, responsible, and high-impact AI applications**
- Seamlessly **integrate AI into existing systems, business operations, and workforce development programs**
- **Increase equitable access** to training, services, and tools through AI-driven solutions
- Educate businesses, job seekers, and stakeholders on **workflow automation, AI ethics, and personalized technologies**
- **Reduce administrative burdens** while improving productivity and service delivery across sectors

B. LAKE COUNTY, ILLINOIS

Lake County is located in northeast Illinois, between the Chicago and Milwaukee metropolitan areas. Lake County is home to about 703,000 residents. Lake County is committed to open government and transparency, and the County board's conservative fiscal policies have allowed the County to maintain fiscal stability and achieve AAA bond rating from Standard & Poor's and Moody's. Lake County is governed by a 19-member board and managed by a County Administrator.

C. BACKGROUND

WIOA is a federal program funded through the U.S. Department of Labor (DOL) and administered by the State of Illinois Department of Commerce and Economic Opportunity (DCEO). WIOA is designed to help job seekers access employment, education, training, and supportive services needed to succeed in the labor market; and to match employers with the skilled workers they need to compete in the global economy. WIOA is the main source of federal funds for workforce development activities throughout the nation. WIOA funding, which is distributed to states and, subsequently, local workforce development boards (WDBs), is used to serve two primary customers: (1) businesses and (2) job seekers. Services are managed and provided by local entities, which must meet performance goals set by DOL, DCEO, and Lake County Workforce Development. The Lake County Workforce Development Board (LCWDB) provides oversight and policy direction for workforce development programming in Lake County. LCWDB is responsible for budgeting the Workforce Innovation and Opportunity Act (WIOA) Title I federal funds received by Lake County and ensures WIOA funds are spent on local workforce development programs and services to meet the needs of the youth, adults, dislocated workers, jobseekers/workers, and businesses throughout Lake County. LCWDB is committed to maintaining high fiduciary standards through the budgeting and oversight of federal funds.

WIOA was signed into law on July 22, 2014, and lays out priorities, possibilities, and requirements for program funds as part of the Act. The U.S. Department of Labor has issued Training and Employment Guidance Letter WIOA No. 19-16 to provide operating guidance for implementing the WIOA. More information from the U.S. Department of Labor on program areas is available at: <https://www.dol.gov/agencies/eta/program-areas/>.

Demand for Artificial Intelligence Education and Resources:

The demand for Artificial Intelligence (AI) specialists is projected to grow by 40% over the next five years, adding approximately one million new job opportunities to the global economy. As AI continues to advance, **91.5% of Information and Communication Technology (ICT) roles** are expected to undergo high or medium levels of transformation. Moreover, **100% of the most impactful ICT occupations** now emphasize the importance of AI literacy, along with a strong understanding of AI ethics and responsible use.

As of 2025, there are an estimated **5 million traditional Information Technology (IT) jobs** in the labor market, with **500,000 of those classified as AI-related**—meaning AI roles now represent approximately **10% of the total IT workforce**.

Sources: * [CNBC](#), [World Economic Forum](#) ** [AI-Enabled ICT Workforce, 2024](#)

AI is rapidly transforming key industry sectors:

- **Healthcare:** Drug discovery, predictive analytics, and personalized treatment
- **Transportation & Logistics:** Route optimization, demand forecasting, and autonomous systems
- **Finance and Professional Services:** Algorithmic trading, fraud detection, and digital process automation
- **Manufacturing:** Smart automation, predictive maintenance, and supply chain efficiency

Why an Artificial Intelligence Implementation and Integration Services Strategy?

In February 2024, the Burning Glass Institute worked with the [Society for Human Resource Management \(SHRM\)](#) to map what the advent of Generative AI technologies will mean for employers' talent strategies. This analysis, and the follow-up [coverage from the New York Times](#), constructed company-level and industry-level Generative AI exposure scores to show where these impacts will be most acutely felt, and where industries and firms will be more insulated from the tectonic shifts GenAI will bring. Using data made available by Felten, Raj and Seamans, Burning Glass Institute economists built an AI exposure measure combining two key considerations: potential exposure of occupations to AI, and the occupational shares of each industries and employer's total payroll spending. Together, these two figures reveal which companies are likely to experience the greatest impact on their workforce from GenAI. Below you can explore these companies' exposure, both overall and by industry sector.

Link to AI Company Exposure by Industry: <https://www.burningglassinstitute.org/company-generative-ai-exposure-rankings>

The share of company payroll spending that goes to workers employed in the 200 occupations within industries to be affected by generative Artificial Intelligence for Fortune 500 companies are: Accommodation and Food, Agriculture, Construction, Finance and Insurance, Healthcare, Social Service, Transportation, Warehouse and Manufacturing, Information Technology, and Professional services. Within The Burning Glass Institute Generative Artificial Intelligence and Workforce Report in partnership with the Society for Human Resource Management (SHRM) it discusses how GenAI will impact industries, companies, jobs, and reshape the economy.

[Burning Glass Institute and SHRM Report: Download Report](#)

The scale and speed of AI adoption underscore the urgent need for expanded access to **AI education, training, and ethical frameworks** to prepare the current and future workforce. Equipping the current and future workforce with foundational knowledge of sustainability includes understanding how technology supports and drives sustainable practices, hands-on learning, and free and flexible learning pathways.

D. FUNDING

Funding Availability Based on total available funds, the Lake County Workforce Development Board (LCWDB) will award up to and not to exceed **\$100,000** in WIOA funding to one qualified firm, vendor, consultant, or vendor capable of delivering comprehensive Artificial Intelligence (AI) solutions, research, and integrated service implementation strategies to a variety of stakeholders. The stakeholders include: Employers, Businesses, Industry Associations, Job Seekers, Municipalities, Government Units, Workforce Development clients, Youth Contractors, Job Center Partner Agencies, Schools, and Summer Programming efforts.

E. CURRENT STATE - PROJECT

Lake County Workforce Development Guiding Principles:

Collaboration:

We strategically engage a variety of local, regional, state, and national partners in workforce and economic development to ensure program effectiveness. The breadth of these activities allows us to connect businesses and individuals to a wide array of resources.

Innovation:

We design and implement initiatives that result in dynamic outcomes for businesses and job seekers alike. We seek creative solutions to current and future workforce development challenges.

Transparency:

We clearly communicate our expectations, policies, and processes to stakeholders and partners. We openly and publicly share the results of our initiatives.

Financial Responsibility and Stewardship:

As stewards of public, private, and philanthropic funds, we ensure effective and efficient management of our resources to achieve the maximum returns on investment and greatest impact on the business or individual served.

Quality:

We commit to continuous improvement. We aspire to a standard of excellence that ensures the delivery of high-caliber services for all stakeholders while identifying opportunities for further growth.

Dignity of Work:

We believe in the value of work and the mutually beneficial impact that it has on individuals and the companies that employ them. We support investment in human capital as a means of strengthening local communities and the regional economy.

Equity:

We intentionally acknowledge systems of oppression when providing the resources and supports people need to reach their full economic and human potential. We actively work to eliminate disparities that people experience based on race/ethnicity, disability, background, gender, age, sexual orientation, or economic and educational status. We partner with employers who share our belief and are committed to the idea that all residents of our region can achieve a meaningful career that provides family-sustaining income.

F. PROJECT TIMELINE

To ensure that Lake County is able to implement the proposed solution, the proposers should indicate their ability to meet the deadlines indicated below:

Event	Date
Release RFP	Monday, August 18, 2025
Pre-Proposal Informational Meeting	Wednesday, September 3, 2025 – 2:00 p.m.
Deadline for RFP Inquiries for Clarification and Posting of Responses	Monday, September 8, 2025 – 4:00 p.m.
Deadline for Proposal Submissions	Monday, September 15, 2025 – 2:00 p.m.
Finalist Interviews (if necessary)	Week of September 29, 2025
Reference Checks & Pre-Award Risk Assessment	October 2025
Workforce Development Board & Lake County Board Approval	October 2025 – January 2026

***This timeline may be subject to change.**

G. PROJECT STATUS

Personnel from the Proposer, Lake County, and other interested Lake County organizations will, as scheduled at a mutually agreed upon frequency, meet to discuss the scope of this project and the progress made by the Proposer in the performance of their obligations hereunder. When ad hoc meetings need to occur, Proposer and Lake County will make every effort to accommodate same.

H. PERFORMANCE LEVELS/MONITORING

Lake County staff will monitor performance levels based on progress reviews and milestone reports, as specified in the project plan created by the Proposer.

I. ACCOUNT REPRESENTATIVE

The Proposer shall assign an Account Representative who has a minimum of 5 years, successful experience in providing these services. The Account Representative, and his or her qualifications, shall be identified in the submittal of the RFP documents. The Account Representative shall be present for presentation of the proposal and must be assigned to Lake County throughout the Contract period.

J. WORK PRODUCT

All work product prepared by Proposer pursuant to a resulting Agreement, including, but not limited to, policies, reports, analysis, plans, designs, calculations, work drawings, studies, photographs, models, and recommendations shall be the property of Lake County. Proposer shall deliver the work product to Lake County upon completion of Proposer's work, or termination of the Agreement, whichever comes first. Proposer may retain copies of such work product for its records; however, Proposer may not use, print, share, disseminate, or publish any work product related to this Agreement without the consent of Lake County.

II. SCOPE OF WORK**Scope of Work- Research Analysis and Assessment Report**

Conduct a comprehensive impact report and analysis that illustrates the projected impact of artificial intelligence on local major industries and the labor market in Lake County. The goal is to provide data-informed insights and strategic recommendations that support the sustainability, equity, and scalability of Artificial Intelligence (AI) solutions across workforce systems, job seekers, community partnerships, and public institutions.

Proposed Services Should Include:

- Identify and estimate timeline and milestones for research within a 6-month timeframe
- Report should consist of quantitative and qualitative analysis findings pertaining to industry and job seeker analysis
- Research is focused on the impact of artificial intelligence on high demand industries such as Professional Services and Business, Manufacturing, Healthcare, Information Technology, Transportation and Logistics, and Education
- Estimate timeframe, and define billable hours to complete the initial research analysis

Scope of Work – Program Overview & Elements

Lake County Workforce Development seeks to implement a multi-dimensional Artificial Intelligence (AI) training and awareness initiative that addresses the evolving needs of the workforce, employers, municipalities, and community partners. The selected vendor will be responsible for designing and delivering content across the following three integrated program areas below, upon the results of their industry, job seeker, and economic development research analysis and assessment report:

AI Literacy & Awareness**Target Audiences:**

- Employers/Businesses & Industry Associations
- Job Seekers
- Municipalities & Governmental Units
- Workforce Clients
- Workforce Development Staff
- Youth Contractors & Partner Agencies
- Schools & Summer Program Participants

Key Components:

- Real-world case studies illustrating AI applications in:
 - Manufacturing
 - Professional Services
 - Education
 - Government
 - Nonprofit Organizations
 - Transportation & Logistics
- Analysis of industry-specific differences in how AI is used
- Introduction to AI career pathways, with a focus on:
 - Emerging occupations driven by AI technologies
 - The skills and competencies required for these future roles

Applied AI for Workforce & Community / Ethical & Inclusive AI Use**Target Audiences:**

- Employers/Businesses & Industry Associations
- Job Seekers
- Municipalities & Governmental Units
- Workforce Clients
- Workforce Development Staff
- Youth Contractors & Partner Agencies
- Schools & Summer Program Participants

Key Components:

- Responsible data governance and privacy practices
- Ethical AI training modules
- Bias detection and mitigation
- Inclusive design and decision-making frameworks
- AI applications that enhance accessibility for diverse populations and learning needs

Dual-Track Training Approach (Internal Capacity & Community Application)**Target Audiences:**

- Workforce Development Internal Staff
- Partner Agencies
- Job Seekers

Key Components:

- Managerial Training:
 - Strategies for leading AI integration into workforce systems
 - Change management best practices
- Front-Line Staff Empowerment:
 - Practical use of AI tools to improve service delivery
 - Workflow optimization using AI
- Credentialing and Recognition:
 - Micro-credentials for completed modules and skills acquisition
- Hands-On Training:
 - Interactive learning tied to real workforce scenarios
 - Sector-specific use cases and toolkits

This scope of work supports a **holistic approach** to AI integration that empowers staff, educates community stakeholders, and enhances access to AI-driven opportunities in Lake County.

III. **SUBMITTAL REQUIREMENTS**

A. Detailed Submittal Requirements

Proposals should be prepared as simple as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, relevance, and clarity of content. The proposal should be organized into the following major sections:

1. Introduction Material and Executive Summary
2. Company Background
3. Scope of Services
4. Implementation Plan
5. Client References
6. Exceptions to the RFP
7. Price Proposal / Value added services (attached)
8. Sustainability Statement
9. Vendor Disclosure Statement (attached)
10. Vendor Certification Form (attached)
11. Addendum Acknowledgement (attached)

All respondents must be in compliance, or agree to comply, with the following federal and state laws and related regulations in order to be considered for an award:

- Workforce Innovation and Opportunity Act
- Equal Employment Opportunity
- Copeland "Anti-Kickback" Act (18 U.S.C. 874 and 40 U.S.C. 276c)
- Davis-Bacon Act, as amended (40 U.S.C. 276a to a-7)
- Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333)
- Rights to Inventions Made Under a Contract or Agreement
- Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended
- Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)
- Debarment and Suspension (E.O.s 12549 and 12689)
- Applicable State of Illinois Laws
- State WIA/WIOA Policies
- Uniform Guidance (2 CFR part 200)
- OMB's approved exceptions for DOL (2 CFR part 2900)
- 20 CFR Parts 667.200 and 667.410

B. Introduction Material and Executive Summary

The introductory material must include a title page with the RFP number, subject, name of the Proposer, address, telephone number, e-mail address, the date, a letter of transmittal and a table of contents. The executive summary should be limited to a brief narrative summarizing the proposal.

C. Company Background

In this section provide information about the company so that the County can evaluate the Proposer's stability and ability to support the commitments set forth in the response to this RFP. Information in this section should contain the following information in addition to the General Information Sheet that is also included as an exhibit to this RFP:

1. Company name and location of the corporate headquarters and of the nearest office to Lake County.
2. The number of years the company has been in business and the number of years the company has been providing services to the public sector.
3. Include information on the company's customer base, such as the number of public sector clients the company serves, the number of local government clients, and the number of public sector clients in the state.
4. Include a brief summary of the company's organizational characteristics such as the number of employees, their backgrounds, whether the company is privately held, publicly traded, or if it is a subsidiary to a parent company.
5. Describe any other business affiliations (e.g., subsidiaries, joint ventures, "soft dollar" arrangements with brokers).
6. Provide a list of your organization's Board of Directors/Decision-Making Body including name, title, and contact information. Please do not list your organization's Advisory Board.
7. Provide one to three examples of similar type of work completed in the past five to seven years
8. Provide a summary organizational chart. Identify the primary contact and describe the roles of each key person.
9. Provide detailed resumes for all key professionals who will be directly responsible for providing services to the County. Include the following information: title, number of years at your firm, total number of years of experience, professional designations, or licenses.

D. Scope of Services

This section of the proposal should include a general discussion of the Proposer's overall understanding of the project and the scope of work. For each item that is identified in the scope of services outlined in the specifications, please identify your company's approach and response to address the desired service outlined.

E. Implementation Plan

This section should describe the Proposer's implementation plan for each task identified in the scope of work. Provide proposed project plan timeline and outline specific areas that will require Lake County staff partnership. Provide project team resumes for key members of the implementation team expected to be on the project.

F. Client References

The County considers references to be an important factor in its decision to award a contract. Proposers should supply references that will be available to speak with the County. Three references should be provided that provided similar type of work completed in the past five to seven years. A reference sheet is included as a submittal as part of this RFP document.

G. Exceptions to the RFP

All requested information to this RFP must be supplied as this document and subsequent proposals submitted help form the basis for a contract with the selected proposer. Proposers may take exception to certain requirements in this RFP. All exceptions shall be clearly identified in this section and written explanation shall include the scope of the exceptions, the ramifications of the exceptions for the County and the descriptions of the advantages or disadvantages to the County as a result of the exception. The County, at its sole discretion, may reject any exceptions or specifications within the proposal.

H. Price Proposal

Complete the Price Proposal form attached.

I. Value Added Services

Please include any value-added services your firm provides in your submittal.

J. Sustainability Statement

Lake County is committed to green and sustainable practices and good environmental stewardship. Consequently, Proposers are asked to provide a Statement of Sustainability to demonstrate that they are also incorporating sustainability into their company's practices. A Sustainability Statement form is included as part of the RFP. Proposers are asked to provide a clear description of your company's sustainable practices, policies, or procedures in the following areas: waste minimization, energy efficiency, water efficiency, staff, and education.

K. Vendor Disclosure Statement

This disclosure statement is being filed in accordance with the Lake County Ethics Ordinance and Lake County Purchasing Ordinance. Effective January 2019, the Lake County Board implemented a Vendor Disclosure Statement Policy, which require vendors to disclose any familial relationships between a Lake County elected official, department director, deputy director, manager and owners, principals or officers of the vendor's company as well as campaign contributions to County elected officials.

L. Vendor Certification Form

This certification form is information that Lake County is collecting for reporting purposes only and will not be used in vendor selection.

M. Addendum Acknowledgment

Any and all changes to the specifications and terms and conditions of this RFP are valid only if they are included by addendum issued by Lake County Purchasing. Proposers shall acknowledge addenda by signing the enclosed Addendum Acknowledgement form. It is the Proposer's responsibility to check for addendums, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum within three business days of the submittal due date.

IV. EVALUATION CRITERIA

The County will conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this procurement effort. All proposals will be evaluated by how well the proposal satisfies the described/stated needs, rather than how exactly the proposal matches the strictest interpretation of the terminology and design concepts stated herein. Newly emerging technologies, additional features, and the ability of the proposed solutions to adapt will be a consideration. Submitted proposals will be reviewed to determine whether the provider meets the following minimum procurement requirements:

- **20 points – Organization Information:** Demonstrated experience providing artificial intelligence training or related instruction to address industry and job seeker needs. Please provide your staffing plan, which includes roles and responsibilities, qualifications, relevant experience, resumes of key staff members, and organizational chart.
- **25 points – Program Description:** Clear and detailed program design, including all elements of the AI RFP's proposed scope of work, key requirements, and proposed services. Summarize how your approach supports Lake County Workforce Developments purpose and intent, while describing the technologies, platforms, or tools to be used or developed. Describe how you will utilize the 100 committed consultant hours. Identify expected business engagement strategies, case study development, and documentation of outcomes. Elaborate on how the **research analysis and assessment report** will be conducted and provided to workforce development prior to AI service integration services.

- **25 points – Curriculum and Training Delivery:** Describe the structure and content of: Foundational AI training modules (onsite and hybrid), Hand-on workshops, Train-the-trainer sessions, Micro-credentialing tracks. Please include estimated hours, delivery formats (live, hybrid, asynchronous), and instructional materials.
- **10 points – AI Career Pathway Development:** Outline approach to building and mapping career pathways in AI and emerging technologies. Include employer engagement strategy, credential stackability, and labor market alignment.
- **10 points – Budget and Financial Management Plan:** Provide monthly consulting fee as it pertains to the professional service agreement. Please also provide clear fiscal management plan detailing accounting procedures, accounting system, internal controls, auditing, compliance controls, and previous experience managing federal workforce development funds (if applicable).
- **10 points – Performance Metrics & Training Outcomes:** Defined measurable benchmarks, including AI-driven tools, foundational training modules, hands-on workshops, consultant hours, industry-relevant case studies, AI career pathway development, micro-credentialing, train-the-trainer models, and recorded instructional content. Provide a detailed timeline by quarter or month, indicating key milestones, deliverables, training cohorts, and evaluation periods.

Total: 100 Points

A. Short List

The evaluation factors will be used to assist the evaluation committee in determining a short list. Proposers will be notified by the County if they have been selected for the short list. Please note, Lake County reserves the right to not shortlist all Proposers if it is not in the best interest of the County.

B. Interview

Lake County reserves the right, as part of the evaluation process, to ask for additional materials, interview, or schedule site visits to any locations serviced by Proposers. Site visits may be scheduled or unscheduled as determined by the County. If applicable, the County shall contact Proposers to arrange an interview. Information provided as part of the interview may be used by Evaluation Committee to re-evaluate and re-rank Proposers.

C. Additional Investigations

The County reserves the right to make such additional investigations as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

D. Best and Final Offer

The County reserves the right to request a Best and Final Offer (BAFO) if additional information or modified terms are necessary for the Evaluation Committee to complete its evaluation and ranking. A BAFO will not be used solely to reduce pricing. If a BAFO is requested, all short-listed proposers, or if the short-list process is not used, all qualified Proposers will be provided an opportunity to submit a modified Response. Only one BAFO request will be issued by the County. The information received from the BAFO will be used by the Evaluation Committee to re-evaluate and re-rank the Proposers.

E. Intent to Negotiate

The County reserves the right to invite the most qualified proposer to negotiate final terms and conditions, finalize scope clarification and confirm final pricing and payment terms. The information received from the negotiation shall be found in the final contract document. If the parties are unable to negotiate a satisfactory contract the negotiations will be terminated. The County reserves the right to either begin negotiations with the qualified proposer that is next preferred or non-award the request for proposal.

V. GENERAL TERMS AND CONDITIONS**A. NEGOTIATIONS**

Lake County reserves the right to negotiate specifications, terms, and conditions, which may be appropriate to the accomplishment of the purpose of this Request for Proposal (RFP).

B. CONFIDENTIALITY

Proposals are subject to the Illinois Freedom of Information Act (FOIA) once an award or final selection is made. As such, all Proposers responding are asked to submit one redacted copy of their proposal that can be used by the County to respond to any future FOIA requests for the proposal.

Please refer to the FOIA statute, 5 ILCS 140/1 et seq., and specifically Section 7 therein, for explanation of information that may be redacted. For example, information exempt from disclosure in response to a FOIA request includes but is not limited to: highly personal or objectionable information; trade secrets and commercial or financial information claimed as proprietary, privileged or confidential, the disclosure of which would cause your business competitive harm; valuable formulae, computer geographic systems, designs, drawings and research data when disclosure of the same would produce private gain or public loss; certain construction related technical documents; and information associated with automated data processing operations that, if disclosed, would jeopardize system or data security.

If no redacted copy is provided, the Lake County Purchasing Division reserves the right to determine what information should be redacted as proprietary, privileged, or confidential in response to a FOIA request. A Proposer who fails to provide a redacted copy of its proposal waives its right to maintain any claims against Lake County, its agents, or employees for disclosure of this information.

C. RESERVED RIGHTS

Lake County reserves the right, at any time and for any reason, to cancel this RFP or any portion thereof, to reject any or all proposals, or to accept an alternate proposal. The County reserves the right to waive any immaterial defect in any proposal. Unless otherwise specified by the Proposer, the County has ninety (90) days to accept. The County may seek clarification from a Proposer at any time. Proposer's failure to respond promptly is cause for rejection. The County may require submission of best and final offers.

D. INCURRED COSTS

Lake County will not be liable for any costs incurred by respondents in replying to this RFP.

E. AWARD

Lake County reserves the right to award this contract based on the evaluation criteria set forth herein. Award shall be made by the Lake County Board to the responsible Proposer(s) determined to be the most qualified and advantageous to the County. Lake County reserves the right to award this Contract in whole or in part if determined to be in the best interests of the County.

F. ADDITIONAL INFORMATION

Should the Proposer require additional information about this RFP, please submit questions on our website at <http://lakecountypurchasingportal.com> by selecting RFP number and addendum link. Questions may also be submitted via email to purchasing@lakecountyil.gov. All questions shall be submitted no less than seven (7) days prior to RFP opening date. ANY and ALL changes to these specifications are valid only if they are included in the written Addendum to all Proposers. No interpretation of the meaning of the plans, specifications or other contract documents will be made orally. Failure of any Proposer to receive any such addendum or interpretation shall not relieve the Proposer from obligation under this RFP as submitted. All addenda so issued shall become part of the RFP documents. Failure to request an interpretation constitutes a waiver to later claim that ambiguities or misunderstandings caused a Proposer to improperly submit a proposal.

G. DISCUSSION OF PROPOSALS AND NEGOTIATION

Lake County may conduct discussions with any Proposer who submits a proposal. During the course of such discussions, the County shall not disclose any information derived from one proposal to any other Proposer. Lake County anticipates conducting negotiations with the successful Proposer. Your proposal should indicate any exceptions taken to this.

H. EXCEPTIONS

Any and all exceptions taken by Proposer to the terms of this RFP are to be identified in writing and included in the list of submittals.

I. CONTRACT TERM

This contract shall be in effect for an 18-month period, ending on June 1, 2027. The County reserves the right to renew the contract an additional 1-year term, contingent upon acceptable performance by the Proposer and the appropriation of sufficient funds.

J. RESPONSIBILITY & DEFAULT

The Proposer shall be required to assume responsibility for all items listed in this RFP. The successful Proposer shall be considered the sole point of contact for purposes of this contract.

K. INTERPRETATION OR CORRECTION OF REQUEST FOR PROPOSALS

Proposers shall promptly notify the Purchasing Division of any ambiguity, inconsistency, or error that they may discover upon examination of the RFP. Interpretation, correction, and changes to the RFP will be made by addendum. Interpretation, corrections, or changes made in any other manner will not be binding.

L. TAXES

The County is exempt from paying certain Illinois State Taxes.

M. TERMINATION

Lake County reserves the right to terminate this Agreement as set forth below.

1. Termination for Convenience:

Lake County reserves the right to terminate this Agreement, or any part of this Agreement, with or without cause, upon 30 days' written notice. In case of such termination, Proposer shall be entitled to receive payment from Lake County for work completed to the date of termination in accordance with the terms and conditions of this Agreement.

2. Termination Due to Material Breach:

In the event that this Agreement is terminated due to the Proposer's material breach, Lake County shall be entitled to purchase substitute items or services elsewhere and charge Proposer with losses the County incurs, including attorney's fees and expenses, notwithstanding any damage limitations the parties may agree to elsewhere.

3. Termination Due to Lack of Appropriations:

If sufficient funds are not appropriated by the Lake County Board to continue the services under this Agreement, then Lake County may terminate this Agreement. Lake County agrees to give written notice of termination to Proposer at least 30 days prior to the end of the last fiscal year for which appropriations were made. Lake County shall remit payment for all work completed and approved or accepted by the County, to the date of termination. Termination under this subsection shall not entitle the Proposer to contractual damages of any kind.

4. Termination Due to Force Majeure Events:

- a) If a Force Majeure Event prevents a party from complying with any one or more obligations under this agreement, that inability to comply will not constitute breach if that party uses reasonable efforts to perform those obligations, that party's inability to perform those obligations is not due to its failure to (A) take reasonable measures to protect itself against events or circumstances of the same type as that Force Majeure Event or (B) develop and maintain a reasonable contingency plan to respond to events or circumstances of the same type as that Force Majeure Event, and that party complies with its obligations under section 16(d)(3), below.
- b) For purposes of this agreement, "Force Majeure Event" means, with respect to a party, any event or circumstance, whether or not foreseeable, that was not caused by that party and any consequences of that event or circumstance.
- c) If a Force Majeure Event occurs, the noncomplying party shall promptly notify the other party of occurrence of that Force Majeure Event and may terminate the Agreement based on it, with an obligation to pay only for services performed prior to the Force Majeure Event.

N. DEBARMENT AND SUSPENSION WITH LAKE COUNTY

- 1. The Lake County Purchasing Ordinance § 33.125 through 33.126 defines the County's Authority and Decision to Debar.
- 2. The Proposer certifies to the best of his or her knowledge and belief that the Proposer:
 - a) Is not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency.
 - b) Has not within a 3-year period preceding this contract been convicted of or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State, or local) transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property;
 - c) Is not presently indicted or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
 - d) Has not, within a three-year period preceding this contract, had one or more public transactions (Federal, State, or local) terminated for cause or default.

3. Proposer agrees that, during the term of this Agreement, Bidder shall report to the County's contract administrator, within 10 days, any allegations to or findings by the National Labor Relations Board (NLRB) or Illinois Labor Relations Board (ILRB) that Proposer has violated a statute or regulation regarding labor standards or relations. If an investigation by the County results in a final determination that the matter adversely affects Consultant's responsibilities under this Agreement, then the County may terminate this contract.

O. NON-DISCRIMINATION

The Proposer agrees to and shall comply with (1) the Equal Opportunity Employer provisions of Section 2000e of Chapter 21, Title 42 of the United States Code and Federal Executive Order Number 11246, as amended by Executive Order 11375, and (2) Chapter 33 of Title III of the Lake County Code of Ordinances (titled "Purchasing").

P. INDEMNIFICATION

The Proposer agrees to indemnify and defend Lake County (its employees, elected officials, executives, and agents) from all claims, actions, demands, judgments or liabilities, fines, penalties, and expenses, including without limitation reasonable legal fees and expert costs, arising out of this Agreement and arising from the Consultant's (its employees', executives', and agents') actions, whether negligent, reckless, or intentional. Lake County shall provide notice to Consultant promptly of any such claim, suit, or proceeding, and will assist Consultant, at Consultant's expense, in defending any such claim, suit, or proceeding.

Q. ASSIGNMENT, ALTERATIONS AND MODIFICATIONS

Any Agreement entered into as a result of this RFP shall not be assigned, delegated, or modified without the express written consent of both parties. The Agreement supersedes all other agreements, oral or written, between the parties with respect to the subject matter of the Agreement.

If Lake County agrees that the Proposer may assign, delegate, or subcontract the work under the Agreement, Proposer shall remain contractually liable to Lake County unless otherwise agreed in writing.

R. CHANGE ORDERS

In the event changes to the scope of the project or additional work become necessary or desired (a "Change"), the parties shall follow the procedures set forth in this Section to memorialize the change (a "Change Order"). A Change Order shall be effective only if documented in writing, dated and signed by both parties, and expressly referencing this Agreement. The Change Order shall set forth in detail: (i) the Change requested, (ii) the reason for the proposed Change; (iii) the cost of the Change; and (iv) the Change's impact on the time for completing the project.

In the event either party desires a Change, the Project Manager for such party shall submit to the other party's Project Manager a proposed Change Order. If the receiving party does not accept the Change Order in writing within 10 business days, the receiving party shall be deemed to have rejected the Change Order. If the parties cannot reach agreement on a proposed Change, Consultant shall nevertheless continue to render performance under this Agreement in accordance with its (unchanged) terms and conditions.

Changes that involve or increase in the amounts payable by the County may require execution by the County Purchasing Agent. Some increases may also require approval by the County Board. In cases where the Purchasing Agent's signature is required, or where County Board approval is needed, the Change Order shall not be deemed rejected by County after 10 days if the County's Project Manager has indicated in writing within the 10-day period an intent to present the Change Order for appropriate signature or approval.

S. JURISDICTION, VENUE, CHOICE OF LAW AND PROFESSIONAL STANDARDS

This RFP and any contract resulting from shall be governed by and construed according to the laws of the State of Illinois. Jurisdiction and venue shall be exclusively found in the 19th Judicial Circuit Court of Lake County Illinois.

T. CHANGE IN STATUS

The Proposer shall notify Lake County immediately of any change in its status resulting from any of the following: (a) Proposer is acquired by another party; (b) Proposer becomes insolvent; (c) Proposer, voluntary or by operation law, becomes subject to the provisions of any chapter of the Bankruptcy Act; (d) Proposer ceases to conduct its operations in normal course of business. Lake County shall have the option to terminate its Agreement with the Proposer immediately on written notice based on any such change in status.

U. DISPUTE RESOLUTION

All issues, claims, or disputes arising out of this Agreement shall be resolved in accordance with the Contract Disputes provision of the Lake County Purchasing Ordinance, § 33.097.

V. NON-ENFORCEMENT BY THE COUNTY

The Proposer shall not be excused from complying with any of the requirements of the Contract because of any failure on the part of the County, on any one or more occasions, to insist on the Proposer performance or to seek the Proposers compliance with any one or more of said terms or conditions.

W. PRECEDENCE

Where there appears to be variances or conflicts, the following order of precedence shall prevail: Lake County General Terms & Conditions, Lake County Request for Proposal Terms Scope of Work, and the Proposal Response.

X. PERSONAL EXAMINATION

Proposers are required to satisfy themselves, by personal examination of the site as to work involved and the difficulties likely to be encountered in the performance of work under this Agreement. No plea of ignorance of conditions that exist now or hereafter, or of any conditions of difficulties that may be encountered in the execution of the work under this Agreement will be accepted as an excuse for failure to or omission on the part of the Proposer to fulfill in every respect all the requirements and specifications, nor will same be accepted as a basis for any claim for extra compensation.

The Proposer is responsible for investigating and gathering all relevant and pertinent information prior to submitting a proposal. By submitting a proposal, the Proposer affirms that they have performed all due diligence and are aware of all critical factors that may affect the provision of the services as described in the RFP. Such critical factors may include but are not limited to; location, space, utilities, scope of operations, and any other conditions, which may affect the Proposer operations. No allowance will be made for not being familiar with existing conditions to be encountered.

Y. PRICING

Pricing shall be included on Proposal Price Sheet. Please note, the price sheet must be completed and submitted with your response. Failure to complete and submit this form may cause you to be considered to be unresponsive to this RFP. A responsive Proposer is defined as a person who has submitted a proposal that conforms in all material respects to the requirements set forth in the Request for Proposal.

Z. JOINT PURCHASING

The purchase of goods and services pursuant to the terms of this Contract shall also be offered for purchases to be made by other governmental units, as authorized by the Governmental Joint Purchasing Act, 30 ILCS 525/0.01 et seq. (the “Act”). All purchases and payments made under the Act shall be made directly by and between each governmental unit and the successful Proposer. The Proposer agrees that Lake County shall not be responsible in any way for purchase orders or payments made by the other governmental units. The Proposer further agrees that all terms and conditions of this Contract shall continue in full force and effect as to the other governmental units during extended terms. The credit or liability of each governmental unit shall remain separate and distinct. Disputes between Proposers and governmental units shall be resolved between the immediate parties.

The Proposer and the other governmental units may negotiate such other and further terms and conditions to this Contract (“Other Terms”) as individual projects may require. To be effective, other terms shall be reduced to writing and signed by a duly authorized representative of both the successful Proposer and the other governmental unit.

The Proposer shall provide the other governmental units with all required documentation set forth in the solicitation including but not limited to performance and payment bonds, Certificates of Insurance naming the respective governmental unit as an additional insured, and certified payrolls to the other governmental unit as required.

AA. ECONOMIC OPPORTUNITY PROGRAM

Lake County launched a **Buy Local. Build Local. Work Local.** initiative in 2013 to increase the outreach and procurement opportunities for businesses located within Lake County, including women-owned businesses and minority-owned business enterprises (L/W/MBE). The overarching objective is to maximize participation from these businesses in the County’s procurement process, in accordance with applicable law. The County will take all necessary and reasonable steps to assure that business enterprises defined as L/W/MBE shall have a fair opportunity to participate in County contracts. As part of its Economic Opportunity Program (EOP) commitment, the County will make every effort to achieve the following objectives:

1. To ensure nondiscrimination in the award and administration of contracts;
2. To create a level playing field on which L/W/MBEs can compete fairly for contracts by providing any necessary training and assistance in bid preparation;
3. To ensure that the County’s EOP is narrowly tailored in accordance with applicable law;
4. To establish a means for firms identifying themselves as L/W/MBEs to register for procurement opportunities and work cooperatively with contracted firms to report on measures that demonstrates the County’s commitment to its EOP; and,
5. To help remove barriers to the participation of L/W/MBEs through notification of contract opportunities.

Successful Proposers are encouraged to work with Workforce Development to post any and all opportunities for employment on County contracts. Lake County’s Workforce Development mission is to foster and ensure the economic prosperity of the Lake County community by maximizing the potential of businesses and workers. As such, Workforce Development provides a key resource for job seekers and employers.

State law mandates an open and competitive procurement process and requires that publicly procured contracts be awarded with no demonstrated preference based on the proposer’s location, race and gender.

AB. REPORTING REQUIREMENTS FOR AWARDED CONTRACTS

All awarded Proposers will identify and report the type of ownership— L/W/MBE, and/or not L/W/MBE for any work that they or their approved subcontractors will perform. In addition, Lake County requests that all awarded Proposers provide an accounting of employees assigned throughout the term of the contract in regard to their home address and ethnicity. Lake County may use any data collected to report on potential of businesses and workers benefitting from County contracts.

AC. LAKE COUNTY OWNERSHIP OF INFORMATION

All information pertaining to records, data collected, property, financial or other information acquired under the scope of this contract shall be strictly confidential and the sole property of Lake County. The Proposer shall return all information to Lake County upon termination, and/or request and shall not utilize any of the information for purposes outside of the scope of this contract or without express approval of Lake County. Upon County request, the Proposer must provide all Lake County data in a documented, standard format.

AD. JOINT VENTURES & SUCCESSFUL PROPOSER MERGERS, ACQUISITIONS, DIVESTITURES OR CHANGE IN STRATEGY

In the event a joint venture is proposed, each party to the joint venture must meet all applicable requirements of the RFP. The party submitting the response shall be considered the sole contact for issues relating to this RFP. In the event of a merger, acquisition, divestiture or change in strategy, the successful proposer will state its commitment to continue to provide services.

AE. OUT OF POCKET EXPENSES

All out-of-pocket expenses paid by the Proposer during the project will be incurred solely at the Proposer's expense.

AF. INFORMATION SECURITY

In the process of providing services to Lake County the Proposer may come in contact with information deemed important and proprietary to Lake County. The Proposer agrees that any services performed for Lake County, whether on Lake County premises or not, will meet or exceed Lake County's information security policy and privacy standards. Lake County reserves the right to audit proposer's performance in meeting these standards.

AG. INDEPENDENT CONTRACTOR, LICENSURE OR CERTIFICATIONS, KEY PERSONNEL

1. **Independent Contractor Status.** The parties intend that the Proposer will be an independent contractor.
2. **Licensure or Certifications.** If required by law, the Proposer must at all times be and remain licensed or certified as a qualified provider of the services provided in this Agreement. Proposer shall submit copies of the required licenses or certifications upon the County's request. Proposer shall promptly notify County in writing of any citation Proposer receives from any licensing or certification authority, including all responses and correction plans.
3. Where the parties have identified particular individuals as being critical to a project ("Key Employees"), then Proposer shall not replace Key Employees without the County's prior written consent, which shall not be unreasonably withheld. Should Key Employees be reassigned, become incapacitated, separate from the Proposer, or be otherwise unable to perform the functions assigned to them, Proposer shall (i) within 10 business days, temporarily replace the person with another properly qualified employee and (ii) within 30 calendar days, permanently replace the person.

Lake County shall have the right to request that Proposer replace Key Employees from the project by setting forth in writing the grounds for the request. Proposer shall have a reasonable time period in which to address the grounds or make a substitution.

AH. EQUAL EMPLOYMENT OPPORTUNITY

Proposer assures, with respect to operation of the WIOA-funded training or activity, that it will comply fully with the nondiscrimination and equal opportunity provisions in sec. 188 of the Workforce Investment Act of 1998; USDOL regulation 29 CFR part 38, as amended; USDOL regulations at 29 CFR parts 31 and 32, including the Nontraditional Employment for Women Act of 1991; Title VI of the Civil Rights Act of 1964, as amended; section 504 of the Rehabilitation Act of 1973 as amended; Title IX of the Education Amendments of 1972, as amended; the Age Discrimination Act of 1975 as amended; the Civil Rights Restoration Act of 1987; executive order 12250; Age Discrimination in Employment Act of 1967; Federal Equal Pay Act of 1963; ILLINOIS Equal Pay Act of 2003; U.S. department of labor regulations at 28 CFR part 42, subparts f & h; Title VII of the Civil Rights Act of 1964, as amended Victims Economic Security and Safety Act; the Veterans' Priority Provisions of the "Jobs for Veterans Act", public law 107-288.

AI. INVOICES & PAYMENT

1. At the start of this Agreement, the County will issue a purchase order for the work and Proposer shall submit invoices detailing the products and services provided and identify the purchase order number on all invoices.
2. Proposer shall maintain records showing the actual time its employees and agents devoted to the project, and the costs incurred. Proposer shall permit a representative from Lake County to inspect and audit all of Proposer's data and records for the work and services provided under this Agreement. Proposer shall make these records available at reasonable times during the Agreement period and for one year after the end of the Agreement.
3. All payments shall be made in accordance with the Illinois Local Government Prompt Payment Act, which generally requires approval of a Consultant's bill within 30 days of receiving the invoice for the services contained in it, and payment within an additional 30 days (50 ILCS 505/1 *et seq.*).
4. Lake County's fiscal year ends on November 30. Invoices for services the Proposer has rendered up until November 30 of each year must be received by Lake County on or before January 15 of the subsequent calendar year.

Other than the timeframe for payments related to the end of Lake County's fiscal year, as stated above, Lake County shall not be held financially liable for payment of any services rendered if the invoice for such services is not sent to the County within 90 days from the date the services were provided.

If this Agreement is terminated prior to its expected expiration date, the Proposer must submit all invoices to Lake County no later than 30 days after the effective date of the termination.

Payment for invoices received beyond the time periods in this subsection will be denied, absent an agreement to the contrary. Failure of the Proposer to invoice the County in the timeframes noted in this section shall constitute the Proposer's waiver of the Proposer's right to payment.

AJ. PRESS/NEWS RELEASES

Consultant may not issue any press or news releases regarding this Agreement without prior approval from Lake County. Consultant shall provide notice to Lake County's Chief Communications Officer if contacted by the media regarding the services set forth in this Agreement.

VI. INSURANCE REQUIREMENTS

- A. The awarded proposer must obtain, for the Contract term and any extension of it, insurance issued by a company or companies qualified to do business in the State of Illinois with an A.M. Best Rating of at least A and provide the County with a Certificate of Insurance 15 days before the start of the project, and thereafter annually upon each renewal date for contracts/projects that will last more than one year. Insurance in the following types and amounts is necessary:

1. Commercial General Liability Insurance

In a broad form on an occurrence basis shall be maintained, to include, but not be limited to, coverage for property damage, bodily injury (including death), personal injury and advertising injury in the following coverage forms where exposure exists:

- Premises and Operations
- Independent Contractors
- Products/Completed Operations
- Liability assumed under an Insured Contract/ Contractual Liability
- Personal Injury and Advertising Injury

With limits of liability not less than:

\$ 1,000,000 Each Occurrence

\$ 1,000,000 Products-Completed Operations

\$ 1,000,000 Personal and Advertising injury limit

\$ 2,000,000 General aggregate; the CGL policy shall be endorsed to provide that the General Aggregate limit applies separately to each of the Consultant's projects away from premises owned or rented to Consultant.

2. Excess/ Umbrella Liability

The Consultant's Excess/ Umbrella liability insurance shall be written with the umbrella follow form and outline the underlying coverage, limits of insurance will be based on size of project:

\$ 2,000,000 per occurrence limit (*minimum*)

3. Automobile Liability Insurance

Automobile liability insurance shall be maintained to respond to claims for damages because of bodily injury, death of a person, or property damage arising out of ownership, maintenance, or use of a motor vehicle. This policy shall be written to cover any auto whether owned, leased, hired, or borrowed.

The Consultant's auto liability insurance, as required above, shall be written with limits of insurance not less than the following:

\$ 1,000,000 Combined single Limit (Each Accident)

4. Workers Compensation (Coverage A) and Employers Liability (Coverage B)

Workers Compensation Insurance covering all liability of the Consultant arising under the Worker's Compensation Act and Worker's Occupational Disease Act at limits in accordance with the laws of the State of Illinois. Employers' Liability Insurance shall be maintained to respond to claims for damages because of bodily injury, occupational sickness, or disease or death of the Consultant's employees, with limits listed below:

Employers Liability

- a) Each Accident \$1,000,000
- b) Disease-Policy Limit \$1,000,000
- c) Disease-Each Employee \$1,000,000

Such Insurance shall contain a waiver of subrogation in favor of Lake County.

5. Professional Liability – Errors and Omissions

The Engineers/Architects/Consultants and/or Software Developer for the plans of the project shall be written with limits of insurance not less than the following:

\$ 1,000,000 per claim per policy year

Coverage shall be provided for up to three (3) years after project completion. Policy is to be on a primary basis if other professional liability is carried.

- B. County, acting at its sole option, may waive any of the foregoing insurance requirements upon a request to do so, but no waiver shall be effective unless made in writing. Such waiver may include or be limited to a reduction in the amount of coverage required above. The extent of waiver shall be determined solely by County's risk manager taking into account the nature of the work and other factors relevant to County's exposure, if any, under this agreement.

C. Liability Insurance Conditions

Proposers agree that with respect to the above required insurance:

- 1. The CGL policy shall be endorsed for the general aggregate to apply on a "per Project" basis;
- 2. The Proposers insurance shall be primary & non-contributory over Lake County's insurance in the event of a claim.
- 3. Proposer agrees that with respect to the above required insurance, Lake County shall be named as additional insured, including its agents, officers, and employees and volunteers and be provided with thirty (30) days' notice, in writing by endorsement, of cancellation or material change. A blanket additional insured ISO endorsement is preferred for Proposers who have multiple projects with the County.
- 4. Lake County shall be provided with Certificates of Insurance and should include the appropriate corresponding ISO form endorsements evidencing the above required insurance, prior to commencement of this Contract and thereafter with certificates evidencing renewals or replacements of said policies of insurance at least thirty (30) days prior to the expiration of cancellation of any such policies. No manuscript endorsements will be accepted. Any hard copies of said Notices and Certificates of Insurance and Endorsements shall be provided to:

**Lake County
Purchasing Division
18 N. County 9th Floor
Waukegan, Illinois 60085**

5. **Electronic copies of Notices, Certificates of Insurance and Endorsements can be emailed to Purchasing@lakecountyil.gov in place of hard copies.**

- D. Failure to Comply: In the event the Proposer fails to obtain or maintain any insurance coverage required under this agreement, Lake County may purchase such insurance coverage and charge the expense to the Proposer.

THE PRICE PROPOSAL SHALL INCLUDE A TOTAL PRICE AS A FIXED FEE FOR ALL SERVICES DELINEATED IN THIS RFP. THE PROPOSER WILL CONSIDER ALL COSTS (LABOR, OVERHEAD, ADMINISTRATION, PROFIT, TRAVEL, ETC.) ASSOCIATED WITH PROVIDING THE SERVICES LISTED IN THIS RFP. ANY HOURLY RATES FOR SERVICES THAT MAY NOT BE INCLUDED SHALL BE PROVIDED WITH THE CORRESPONDING SERVICE AND RATE.

The quote will consider all costs (labor, material, overhead, administration, profit, travel, etc.) associated with providing the services listed in this RFP. (Please attach additional sheets if necessary)

Action Item	Proposed Price	Number of Hours
TOTAL:		

[illegible][illegible]

SUSTAINABILITY STATEMENT

The County of Lake has a responsibility to balance fiscal, environmental, and social considerations into its operational decision-making process. The County's commitment to green and sustainable practices and good environmental stewardship was memorialized by the Lake County Board in the County's 2013 Strategic Plan where sustainability is listed as a value and a goal. This was further strengthened in September 2020 by adopting a Net Zero Emissions goal through Joint Resolution. Therefore, we shall promote environmentally preferable purchasing, whenever practical, by procuring goods or services that lessen the destructive effects on the environment and the health and well-being of all citizens.

Consideration of the practices adopted by our contracted proposer is key to magnifying the impact of the County's sustainability measures. A Proposer is requested to provide a Statement of Sustainability demonstrating the methods they have incorporated into their company. Sustainability may be one of the scoring criteria included in the evaluation rubric for the award of this contract.

INSTRUCTIONS

Please provide a narrative outlining any policies or practices implemented by your company to reduce your carbon footprint. Your response should include, but need not be limited to:

- A copy of your company's sustainability policy, awards, and accolades.
- Practices such as waste minimization, energy/water efficiency, methods instituted to reduce pollution, green products utilized, staff education, community involvement and volunteerism.
 - Specifically include the percentage of your firm's energy that comes from renewable sources and percentage of your fleet that is non-emitting.
- Sustainable approaches your company may have for this specific project.
- Cost variances to incorporate a more sustainable approach to this project and any calculated life cycle costs.

Attachment A – Cover Sheet

Proposal Response Cover Sheet		
Name of Organization:		
Address:		
Name and Title of Contact:		
Provide the following information for the above-named contact:		
Telephone #:	Fax #:	Email:
Legal Status: Private for-Profit Corp. (Date Incorp/State _____); Private Not-for-Profit Corp. (Date Incorp/State _____); Public Agency (Specify _____); Sole Proprietorship; _____ Partnership; _____ Other (Specify: _____)		
Organization Information: _____ If you are an individual, enter your name and SSN as it appears on your Social Security Card. If completing this certification for a sole proprietorship, enter the owner's name followed by the name of the business and the owner's SSN. For all other entities, enter the name of the entity (as used to apply for the entity's EIN) and the EIN. FEIN/SSN Number: _____ IRS Classification for Tax Exemption: _____		
Total Project Cost/Budget: \$ _____ Total Number of Participants Served: _____ Cost per Participant: \$ _____		
The Proposer certifies that the information provided in this Request for Proposal including all Attachments, are true, accurate and current; and the person signing below is authorized to do so on behalf of the above-named organization. Signature of Duly Authorized Representative:		
_____ Signature		_____ Date
_____ Typed/Printed Name		_____ Typed/Printed Title

Attachment B – Professional Services Fee, Staff Wage, & Hours Summary

The established RFP where an invoice will be created by the approved vendor for services created, planned, forecasted, and rendered within the contracted period. The approved vendor is expected to submit a monthly invoice for services, activities, and tasks stated within the scope of work. The RFP will be reimburse based off one of the following acceptable line item:, Billable hours, standard monthly fee, or staff cost (which include wages, benefits, and FICA following a staff allocation plan) . Please confirm how your entity plans to invoice Lake County.

Budget Categories	Proposed Amount/Price	Narrative
TOTAL:		

Attachment C – Artificial Intelligence Implementation and Integration of Services Outcomes

RFP Respondent must input Target Benchmarks for each Metric Category within their own template

Category	Metric	Target
AI-Driven Tools Implementation	# of AI tools introduced	
Foundational Training Modules(Onsite/Hybrid Delivery)	# of participants enrolled (onsite/hybrid)	
	# of participants who completed training	
Hands-On Workshops	# of workshops held	
	Avg. # of attendees per session	
Consultant Hours (100 hrs for businesses)	# of businesses engaged	
	# of consulting hours utilized	
Industry-Relevant Case Studies	# of case studies developed	
	# of case studies distributed/shared	
AI Career Pathway Development	# of career maps/pathways created	
Micro-Credentialing	# of credentials issued	
	% credential completion rate	
Train-the-Trainer Model	# of internal staff trained as trainers	
Recorded Instructional Content	# of recorded sessions produced	
	# of views or access points	
Research Analysis and Assessment Report	# of Impact Analysis and Assessment Reports Completed	

Attachment D – Affirmative Action Policy Statement

It is the policy of _____ (agency) to provide equal employment opportunity to all persons, regardless of race, color, religion, sex, or national origin. Therefore, this organization shall take Affirmative Action to ensure that it shall:

- a. Recruit, hire, and promote all job classifications regardless of race, color, religion, sex, age, disability, political affiliation, or national origin.
- b. Make promotional decisions that are in accordance with principles of equal employment opportunity by imposing only valid requirements for promotional opportunities.
- c. Incorporate equal employment opportunity policy in all personnel actions such as compensation, benefits, transfers, layoffs, returns from layoffs, company sponsored training, education, and tuition assistance.
- d. Conduct programs without regard to race, color, sex, religion, or national origin.

The success of an Affirmative Action Program requires maximum cooperation between management and its employees.

_____ will be the Human Rights representative for

_____ (agency). This person shall be responsible for working with the Department of Human Rights for the purpose of aiding this agency in establishing future Affirmative Action goals.

Attachment F – Certification Regarding Lobbying

The undersigned certified, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned to any person for influencing or attempting to influence an officer or employee of Congress, or any employee or a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreement and the extension, continuations, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall be completed and submit the Standard Form-LLL, "Disclosure Form to Report Lobbying" in accordance with its instruction.
3. The Undersigned shall require that the language of this certification be included in the award documents for all subawards and tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each failure.

Organization

Signature of Certifying Official

Date

Name and Title of Certifying Official

NOTE: In these instances, "All," in the Final Rule is expected to be clarified to show that it applies to covered contract/grant transactions over \$100,000 (per OMB).

Attachment G – Certification Regarding Debarment, Suspension and Other Responsibility Matters Primary Covered Transactions

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR part 98, section 98.510, Participant Responsibilities. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 19160-19211).

(BEFORE SIGNING, READ INSTRUCTIONS WHICH ARE AN INTEGRAL PART OF THE CERTIFICATION)

1. The prospective primary participant certifies to the best of its knowledge and belief that it and its principles:
 - (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal debarment or agency;
 - (b) Have not within a three-year period preceding this proposal been convicted or had civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
 - (c) Are not presently indicate for or otherwise criminally or civilly charged by a government entity (Federal, State, or Local) with commission of any of the offenses enumerated in paragraph (1) (b) of this certification; and
 - (d) Have not, within a three-year period preceding this application/proposal, had one or more public transactions (Federal, State, or Local) terminated for cause of default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Name and Title of Authorized Representative

Signature

Date

Attachment H – Value Added Services

Proposers are requested to describe and provide a cost for any additional/optional services that are not provided as part of the RFP proposal.

*Stipends Provided or other In-Kind Services:

Price Schedule for Value Added Services

Item	Additional Service	Description of Optional Service	Price and/or Cost Basis for Service
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			



Addendum Acknowledgement

The undersigned acknowledges receipt of the following addendum(s):

ADDENDUM #

I have examined and carefully prepared the submittal documentation in detail before submitting my response to Lake County.

Submittal Number: _____

Company Name: _____

Authorized Signature: _____

Printed Name/Title: _____

Date: _____

It is the vendor's responsibility to check for addendums, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum posted within three business days of the submittal due date.

If the submittal has already been received by Lake County, vendors are required to acknowledge receipt of addendum via email to purchasing@lakecountyil.gov prior to the due date.

Submittals that do not acknowledge addendums may be rejected.

GENERAL INFORMATION SHEET

AUTHORIZED NEGOTIATORS:

Name:	Title:
Phone:	Email:
Name:	Title:
Phone:	Email:

BUSINESS ORGANIZATION: (check one only)

- ☐ Sole Proprietor: An individual whose signature is affixed to this proposal.
- ☐ Partnership: State full names, titles, and addresses of all responsible principals and/or partners on attached sheet.
- ☐ Corporation: State of incorporation: [Click or tap here to enter text.](#)
- ☐ Non-profit Corporation
- ☐ 501c3-- U.S. Internal Revenue Code

By signing this proposal document, the proposer hereby certifies that it is not barred from responding on this contract as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code of 1961, as amended.

Full Legal Business Name:	
Authorized Signature:	Date:
Printed Name/Title:	

REFERENCES

List below other similar size clients for whom you have provided similar services. Please include the email address for each reference.

Agency Name:
Mailing Address:
Contact Person/Title:
Phone Number:
Email:
Dates of Service:
Project/Service Provided:
Number of Employees:

Agency Name:
Mailing Address:
Contact Person/Title:
Phone Number:
Email:
Dates of Service:
Project/Service Provided:
Number of Employees:

Agency Name:
Mailing Address:
Contact Person/Title:
Phone Number:
Email:
Dates of Service:
Project/Service Provided:
Number of Employees:

Agency Name:
Mailing Address:
Contact Person/Title:
Phone Number:
Email:
Dates of Service:
Project/Service Provided:
Number of Employees:

VENDOR DISCLOSURE STATEMENT

Vendor Name:			
Address:			
Contact Person:		Phone #:	
Bid/RFP/SOI/Contract/Renewal:			

Vendors wishing to contract with Lake County for goods and services in an amount greater than \$30,000 shall submit this form in advance of award. This disclosure statement is not required for utility companies regulated by the Illinois Commerce Commission or local units of government. Vendors shall disclose:

- A familial relationship between a Lake County elected official, department director, deputy director and manager and owners, principals, executives, officers, account managers or other similar managerial positions of the vendor's company. Familial relationship is defined as a spouse (including civil partner), child, stepchild, parent, stepparent, grandparent, in-laws (including parent, grandparent, sibling, or child), relatives and non-relatives living in the same residence, and offspring born to any aforementioned person.
- All political campaign contributions made by the vendor or an owner, principal, executive, officer, account manager, or other similar managerial position of the vendor to any county board member, county board chair, or countywide elected official within the last five years.

If there is nothing to report in a section, please state NONE in the appropriate space.

FAMILIAL RELATIONSHIPS

List names and departments/agencies of Lake County employees or public officials with whom owners, principals, or officers of the vendor's company have a familial relationship and the nature of the relationship. Attach additional pages, as necessary. (Provide all names or state NONE in the space below. Do not leave blank.)

Name and Department/Agency of Lake County Employee/Public Official	Familial Relationship

CAMPAIGN CONTRIBUTIONS

List campaign contributions that have been made within the last five years that exceed \$150 annually. Attach additional pages, as necessary. (Provide all names or state NONE in the space below. Do not leave blank.)

Recipient	Donor	Description (e.g., cash, type of item, in-kind service, etc.)	Amount/Value	Date Made

Continuing disclosure is required if information changes. This Vendor Disclosure Statement form is available at www.lakecountyil.gov. The full text of the County's Ethics and Procurement policies and ordinances are available at www.lakecountyil.gov.

I hereby acknowledge that the information above is accurate and complete, that I am an authorized signer on behalf of the vendor, that I have read and understand these disclosure requirements, and that I agree to update this information if there are any related changes by submitting a new Vendor Disclosure Statement.

Authorized Signature:		Title:	
Printed Name:		Date:	

☐ **Vendors: Check this box when indicating exception. Then provide a brief narrative for exception below.**



VENDOR CERTIFICATION FORM

Bid/RFP/SOI Number:			
Vendor Name:			
Address:			
Primary Contact Name:			
Primary Contact Email Address:			
Primary Contact Phone Number:			
Project Manager Name:			
Project Manager Email Address:			
Project Manager Phone Number:			
# Years in Business:		Number of Employees:	
Annual Sales:	\$	Dunn & Bradstreet #:	
Vendor Certification Statement: Please identify all the following that apply to the ownership of this firm. This information is collected for reporting purposes only and not vendor selection. Please include a copy of the certification. (Definitions are included on the second page of Vendor Certification Form).			
<input type="checkbox"/>	Contractor certifies as a Minority – Business Enterprise (MBE)		
<input type="checkbox"/>	Contractor certifies as a Women Business Enterprise (WBE)		
<input type="checkbox"/>	Contractor certifies as a Veteran-Owned (VBE) Business Enterprise		
<input type="checkbox"/>	Contractor certifies as a Persons with Disabilities Owned Business Enterprise (PDBE)		
<input type="checkbox"/>	Contractor certifies as a Service-Disabled Veteran-Owned (SDVBE) Business Enterprise		
<input type="checkbox"/>	Contractor certifies as a Business Enterprise Program (BEP)		
<input type="checkbox"/>	Contractor certifies as a Small Disadvantaged Businesses (SDB)		
<input type="checkbox"/>	Contractor certifies as a Veteran-Owned Small Business (VOSB)		
<input type="checkbox"/>	Local Business		
<input type="checkbox"/>	None		
Other (Specify)			
Certification Number:			
Certified by (Agency):			

I certify that this information is accurate to the best of my knowledge and that I am authorized to provide this information on behalf of my company.

Signature:	Date:
Printed Name:	Title:

Vendor Certification Definitions

- **Minority-owned business (MBE)**
A business concern which is at least 51% owned by one or more minority persons, or in the case of a corporation, at least 51% of the stock in which is owned by one or more minority persons; and the management and daily business operations of which are controlled by one or more of the minority individuals who own it.
- **Woman-owned business (WBE)**
A business which is at least 51% owned by one or more women, or, in the case of a corporation, at least 51% of the stock in which is owned by one or more women; and the management and daily business operations of which are controlled by one or more of the women who own it.
- **Veteran-owned Business Enterprise (VBE)**
A small business (i) that is at least 51 percent owned, controlled and managed by one or more Eligible Veterans or in the case of a corporation, at least 51 percent or more of the stock of which is owned, controlled and managed by one or more Eligible Veterans.
 - **Eligible Veteran** means a person who (i) has been either a member of the armed forces of the United States or, while a citizen of the United States, was a member of the armed forces of allies of the United States in time of hostilities with a foreign country and (ii) has served under one or more of the following conditions: (a) the veteran served a total of at least 6 months; (b) the veteran served for the duration of hostilities regardless of the length of the engagement; (c) the veteran was discharged on the basis of hardship; or (d) the veteran was released from active duty because of a service connected disability and was discharged under honorable conditions.
 - **Armed Forces of the United States** means the United States Army, Navy, Air Force, Marine Corps, Coast Guard, or service in active duty as defined under 38 U.S.C. Section 101. Service in the Merchant Marine that constitutes active duty under Section 401 of federal Public Act 95-202 shall also be considered service in the armed forces for purposes of this Division.
- **Persons with Disabilities Owned Business Enterprise (PDBE)**
A small business (i) that is at least 51 percent owned, controlled and managed by one or more Persons with a Disability; or in the case of a corporation, at least 51 percent or more of the stock of which is owned, controlled, and managed by one or more Persons with a Disability.
 - **Disability or Disabled** means, with respect to an individual, a physical or mental impairment that substantially limits one or more of the major life activities of the individual, a record of physical or mental impairment that substantially limits one or more of the major life activities of the individual, or being regarded as an individual with a physical or mental impairment that substantially limits one or more of the major life activities of the individual.
- **Service-Disabled Veteran-owned Business Enterprise (SDVBE)**
A small business (i) that is at least 51 percent owned, controlled, and managed by one or more qualified service-disabled veterans or in the case of a corporation, at least 51 percent or more of the stock of which is owned, controlled and managed by one or more Service Disabled Veterans.
 - **Service-Disabled Veteran** means an Eligible Veteran who has been found to have 10 percent or more service-connected disability by the United States Department of Veterans Affairs or the United States Department of Defense.
 - **Service-connected disability** means a disability incurred in the line of duty in the active military, naval or air service as described in 38 U.S.C. 101(16).
- **BEP – Business Enterprise Program**
Business Enterprise Program (BEP) BEP assists businesses owned by minorities, women, and people with disabilities gain access to the State of Illinois procurement process. BEP certification with the State of Illinois can also open the door to opportunities with other public and private entities which are looking for diverse suppliers.
- **Small Disadvantaged Businesses (SDB)**
A Small Disadvantaged Business (SDB) is a small business owned and controlled by socially and economically disadvantaged individuals as defined by Federal Acquisition Regulation (FAR) 19.001
- **Veteran-Owned Small Business (VOSB)**
A Veteran-Owned Small Business (VOSB) is a small business that is at least 51 percent owned by one or more veterans; or, if a publicly owned business, at least 51 percent of the stock is owned by one or more veterans. Also, one or more veterans control management and daily business operations of the firm.
- **Local business**
Lake County launched a Buy Local. Build Local. Work Local initiative in 2013 to increase the outreach and procurement opportunities for businesses located within Lake County, including women-owned businesses and minority-owned business enterprises (L/W/MBE). The overarching objective is to maximize participation from these businesses in the County's procurement process, in accordance with applicable law.