



REQUEST FOR PROPOSALS (RFP)
Apprenticeship Tracking & Skills Data System

SECTION 1: Contacts and Important Dates

Contact

Kinsey Mantay
Regional Apprenticeship Administrator
Workforce Intelligence Network (WIN)
kinsey.mantay@WINintelligence.org

RFP Timeline

- A. **Request for proposals release date:** February 6, 2019
- B. **Deadline for submitting proposals:** 5pm EST, March 11, 2019

Delivery Method for submitting proposals: E-mail bids to kinsey.mantay@WINintelligence.org. In email subject line, please include: "Proposal for WIN RFP." Only emailed proposals will be considered.

Deadline for questions: 5pm EST, February 18, 2019

Method for submitting questions: E-mail questions to kinsey.mantay@WINintelligence.org by 5pm EST on February 18, 2019. In email subject line, please include: "Questions submission: WIN RFP." Only questions submitted via email will be acknowledged.

All questions related to the RFP that are received by the date specified will be answered and posted on the RFP website by 5pm EST on February 22, 2019.

- C. **Consultation/partnership timeline:**
Content development will be ongoing until deliverables have been fully completed and provided to WIN. More information on target milestone dates can be found in the Evaluation Criteria section below.
- D. **Contract and Payment Schedule**
WIN requires that all services are listed within bidder proposals showing hourly rates for each individual service. A monthly invoice payment schedule is anticipated, with invoices composed of hours worked. Any services and deliverables executed under this contract will be paid on a reimbursement basis only. This is not an RFP for a retainer contract, and as such, all billing must reflect actual work completed. Additional details are listed in Section 4: Proposal Requirements.



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SECTION 2: Statement of Purpose and Background

Statement of Purpose

The Advance Michigan Center for Apprenticeship Innovation (AMCAI) is a \$4 million American Apprenticeship Initiative grant recipient tasked with expanding regional apprenticeship through statewide innovation. AMCAI covers greater Southeast Michigan and promotes the overall goal of expanding and enhancing Department of Labor (DOL) Registered Apprenticeships. Led by the Southeast Michigan Community Alliance (SEMCA) and Workforce Intelligence Network for Southeast Michigan (WIN), AMCAI is comprised of community colleges and Michigan Works! Agencies from across the region.

AMCAI is seeking partners to support its goal of cultivating a strong apprenticeship ecosystem in the greater Southeast Michigan region. To that end, AMCAI aims to launch a comprehensive apprenticeship tracking system that will not only allow for efficient apprenticeship tracking and reporting, but will also help employers to build customized competency-based apprenticeship programs and be a mechanism for capturing and analyzing skills data associated with competency-based apprenticeships.

Background

Across the country, major skills gaps exist in existing and emerging industries, particularly in advanced manufacturing and professional trades. Apprenticeship is one powerful way of ensuring that employers retain institutional knowledge held by employees nearing retirement age, and of building internal talent that will grow their businesses. AMCAI believes that competency-based apprenticeships are an especially good option for employers as they provide realistic measures of apprentices' skills gained and allow greater flexibility for the duration of apprenticeship programs.

Further, AMCAI believes that competency-based apprenticeships provide a powerful opportunity for workforce development entities to gain a clearer picture of the skills required to perform various jobs, especially for those positions that utilize technologies that continue to evolve. Having more clarity around which skills employers most need could have broad implications for the way employers and workforce development entities fill jobs and develop new talent.

The following is a summary of some key issues that AMCAI seeks to address in this project.

Common language among employers and workforce partners.

One difficulty in developing quality competency-based apprenticeships and education is the lack of a common language with which to define required skills. This gap exists between (a) employers seeking to hire skilled employees, (b) institutions looking to train potential employees to satisfy employers' needs, and (c) candidates seeking more information about the skills they need to achieve to attain high-demand careers. Employers often use very detailed competency descriptions and work instructions to define needed skills, while educational



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institutions use high-level course descriptions and course outcomes to define the skills their students will attain.

Performance Based Objectives (PBOs) provide a common language to bridge this gap. PBOs are concise and straightforward statements of skill that can be easily understood by employers, educators, and employees or candidates. PBOs can also be the ideal building blocks for competency-based apprenticeships that are concise and clearly define the needs of employers, while providing apprentices themselves with a clear picture of what they're expected to learn throughout the course of their apprenticeship.

Streamlined apprenticeship development process.

The current process for developing an apprenticeship program can vary by employer but can sometimes be time-consuming and inefficient. This is especially true for competency-based apprenticeships, as the examples to draw from often fill dozens of pages and require detailed review and customization. The individuals who have the expertise to review and customize apprenticeship programs are often some of an employer's most valuable and busy subject matter experts (SMEs). As a result, this process can take months for the simple reason that developing an apprenticeship program is often a low priority for those SMEs when compared with their day-to-day high-priority tasks.

However, this process can be done extremely efficiently using existing PBOs as the building blocks for competency-based apprenticeships. In pilots conducted by AMCAI, the process for developing a fully customized apprenticeship work process with the employer SMEs has taken as little as two hours as long as there is sufficient engagement from employer SMEs.

Clear and consistent skills data.

Since employers and workforce development professionals lack a common language for defining skills, there is also a lack of clear skills data on a national level. Such data, when aggregated to ensure anonymity for employers and apprentices, can be used to define which skills are required for which occupations, populate job postings and candidate resumes, align college coursework to available jobs, and enumerate how many job seekers possess skills that employers need.

Since registered apprenticeships are tied to Standard Occupational Classification (SOC) codes, and since competency-based apprenticeships require a standard set of skills tied to those SOC codes, they provide a convenient mechanism for collecting skills data that can be used on a broad scale.



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SECTION 3: Scope of Work and Deliverables

Scope of Work

Under the supervision of the AMCAI Program Management team, the selected contractor(s) will work to accomplish the following proposed activities within a fixed budget, described below in “Deliverables.”

AMCAI aims to leverage existing tools to create a system that ties together the apprenticeship development process, apprenticeship tracking, and skills data. In order to create this system, AMCAI seeks partners to assist with the following:

1. **Master PBO Development (ongoing).** For skills data to be collected and aggregated across programs, AMCAI seeks subject matter experts (SMEs) to develop, and continually expand and improve, a master set of Performance Based Objectives (PBOs). PBOs may be developed to reflect required skills in various occupational groups, but AMCAI intends to develop a pilot set of PBOs in the high-demand occupational areas including in advanced manufacturing and certain professional trades. PBO development will leverage existing resources, including:
 - a. [PBOs](#) developed by the Multi-State Advanced Manufacturing Consortium (MSAMC).
 - b. [Competency Based Occupation Frameworks](#) (CBOFs) developed by the Urban Institute.
2. **Apprenticeship Tracking System Enhancement.** AMCAI seeks to partner with a provider of an existing apprenticeship tracking tool to both utilize the existing tool for ongoing apprenticeship tracking, and to develop the additional functionality required for broad PBO tracking across competency-based apprenticeships that utilize the system. AMCAI partners across Michigan will continue to work with companies to develop and launch new apprenticeship programs, building from master PBOs.
3. **Apprenticeship Tracking (ongoing).** AMCAI employers will have the option to utilize the selected web-based apprenticeship tracking tool for apprentices registered during the AMCAI project. Those that are competency-based will use Master PBOs whenever appropriate, as described above. Ongoing apprenticeship tracking will occur using the web-based apprenticeship tracking tool, and employers will document apprentice competency (PBO) achievement on a quarterly or semi-annual basis.
4. **Skills Data Aggregation (ongoing).** Ongoing competency-based apprenticeship tracking will generate data that can provide information useful to the workforce system. As increasing numbers of programs are created with apprentices entering data into the tracking system, it can be aggregated to provide insights about the skills (PBOs) required for various occupations. Useful conclusions can only be drawn from this data if a significant number of programs are tracked using this model, which sets the stage for ongoing collection of information and analysis.



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Deliverables

AMCAI seeks partners to achieve the following deliverables in order to develop a comprehensive apprenticeship tracking and skills data system. Respondents may submit proposals for some or all elements listed below.

1. **Apprenticeship Tracking Tool.** A strong apprenticeship tracking tool will be the backbone of AMCAI's efforts to build this system.
 - a. Facilitate tracking for apprentices in competency-based, hybrid, and time-based programs (current apprentices, or those registered before October 1, 2020), available immediately.
 - b. Develop online interface and infrastructure to
 - i. House master PBOs that can be linked to an unlimited number of CB/HY apprenticeship programs.
 - ii. Enable employers/intermediaries to use a checklist tool to develop customized CB/HY apprenticeship programs.
 - iii. Generate reports on common PBOs used across programs.
2. **Master PBO Development.** AMCAI seeks to partner with subject matter expert(s) (SMEs) and/or an organization that will facilitate the development of PBOs by SMEs.
 - a. Develop a master set of PBOs for advanced manufacturing and professional trades, leveraging existing material (see above). Ideally, PBOs will be developed to cover the following areas/technologies.
 - i. Mechanical
 - ii. Electrical
 - iii. Robotics and automation
 - iv. Additive manufacturing and design
 - v. Emerging technologies
 - b. Continuous improvement and additions to master PBOs.
3. **Skills Data Expertise.** In order to ensure that AMCAI's work is in line with national activity focused on skills data, AMCAI seeks to partner with one or more experts in the field of LMI and skills data.
 - a. Guide project team on system development to ensure that relevant stakeholders' needs are addressed, and the project is aligned with relevant national projects.



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- i. Understand the current national landscape of LMI and skills data, including the limitations of the data currently available.
 - ii. Be familiar with relevant federal and state policies and their implications in the context of AMCAI's project.
- b. Advise project team on appropriate measures for ensuring data privacy and anonymity.
 - c. Advise project team on data analysis and statistical significance of conclusions.

SECTION 4: Proposal Requirements

Proposal Format

For a proposal to receive funding consideration, the application included in this packet must be answered completely. Proposers should take care in following the format of the application. Adherence to this format is essential since evaluation criteria is based on the structure of the RFP. Failure to follow the requested format may result in the disqualification of your proposal.

Proposals should be prepared as simply as possible and provide a concise description of the bidder's capabilities to produce deliverables. The proposal narrative should be no longer than eight (8) pages total and include the following:

1. Cover page (template included in RFP)
2. Executive summary
3. Methodology
4. Past performance
5. Proposed timeline with milestones
6. Total project costs

The following attachments are required to be submitted as part of the response, and are not part of the eight-page limit:

7. Attachment: Completed bidders signature sheet (form included in RFP)
8. Attachment: Completed Risk Assessment questionnaire (form included in RFP)

Bid Review Process

A. Preliminary Screening

To be considered for funding you must complete the entire application and submit it by the deadline. Based on your response, an evaluation team will determine whether further



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consideration of the application is warranted.

B. Follow-up / Fact-Finding Documentation

Upon analysis of your completed application and budget, you may be asked by WIN to submit additional information or details to the evaluation team. You may also be asked to provide a presentation or demonstration of your organization's abilities to successfully fulfill the proposal requirements.

C. Evaluation Process

Proposals will be scored using a pre-determined scoring matrix by an evaluation committee. Vendors with the top proposals may be asked to participate in an interview or asked to provide further information/clarification. Recommendations from WIN will be made for final approval.

WIN/SEMCA is seeking the services of an organization that is qualified and experienced in providing a comprehensive package of services. For maximum flexibility, continuity and efficiency, WIN/SEMCA may contract with one or with multiple organizations to provide the deliverables as outlined in this Request for Proposal.

Proposal Content and Evaluation

Based on the proposal submitted, your suitability to deliver services will be rated in the following manner:

- Total Cost – 20 points maximum
- Timeline – 10 points maximum
- Capacity to deliver scope of work – 25 points maximum
- Relevant expertise – 25 points maximum
- Past performance – 20 points maximum

Because this RFP encompasses different types of work and deliverables, and individual proposals may only address a portion of the deliverables required, the following table provides explanation for the evaluation criteria for each type of work. Proposals that include more than one type of deliverable will be evaluated against all relevant benchmarks listed in the table that follows.



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Criteria Category	Criteria Description			Points Possible
	Apprenticeship Tracking Tool	SME (or SME Facilitation)	LMI Expertise	
Affordability	Reasonable market price	Reasonable market price	Reasonable market price	20
Timeline	Goal: system infrastructure in place by June 2019	Goal: master PBOs developed by September 2019	Goal: ongoing project support from design through continuous improvement	10
Capacity to deliver scope of work	- Existing tool ready for implementation - Immediate capacity for new development	- Immediate capacity - Staff capability OR access to SMEs	- Immediate capacity	25
Relevant expertise	- Software development - User interface design	- Current and emerging technologies (or access to relevant SMEs) - Project management	- LMI data - National skills data initiatives - Existing LMI data sources - Data analysis	25
Past performance	- Related projects - Understanding of AMCAI partners and project	- Related projects - Understanding of AMCAI partners and project	- Related projects - Understanding of AMCAI partners and project	20

SECTION 5: General Terms and Conditions

Selection of Contractor(s)

The Southeast Michigan Community Alliance (SEMCA) is the fiduciary agent of the Workforce Intelligence Network (WIN). The following section will reference SEMCA/WIN as one entity.

SEMCA/WIN will comply with all federal and state mandates governing contractor selection including federal guidelines 2 CFR 200. Due to the potential funding source for SEMCA/WIN, contractors are required to abide by the same standards and regulations (2 CFR 200).

To be considered for funding, contractors must have:

1. Adequate financial resources or the ability to obtain them;
2. The ability to meet program design specifications at a reasonable cost;
3. A satisfactory record of past performance; and
4. A satisfactory record of integrity, business ethics, and fiscal accountability.



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Grievance Policy

SEMCA/WIN subscribes to the policy of equal opportunity and as such, maintains a formal grievance procedure to handle complaints of customers and service deliverers. Adherence to the same is acknowledged by acceptance of a contract from SEMCA/WIN.

Protest Procedures

SEMCA/WIN shall follow appropriate protest procedures in the event the awarding of bids is questioned or challenged. These procedures will be advertised as part of the RFP process and will be available at any time upon written request.

An individual, company or organization not in agreement with the awarding of a bid shall submit a written protest to the Chief Executive Officer of SEMCA and the Executive Director of WIN, within five business days of awarding a bid. If the SEMCA/WIN vendor has not been notified prior to SEMCA/WIN's receipt of protest, the notification will be held pending resolution of the protest.

SEMCA/WIN shall review the protest and respond to the protest in writing within 10 business days of its receipt. If the complainant is not satisfied with the response, they may appeal it to SEMCA/WIN. If an agreement is still not reached the complainant shall obtain, at their expense, an arbitrator that is acceptable to all parties. The appointed individual will evaluate all information and make the final decision.

Right to Refusal and Proposal Preparation Costs

This preliminary application does not commit SEMCA/WIN to award a contract, or to pay any costs incurred in the preparation of a proposal submitted in response to this request or to procure or contract services or supplies. This includes any demonstration and/or interviews that are part of the proposal process. SEMCA/WIN reserves the right to accept or reject any or all proposals in part or in their entirety if it is in the best interest of SEMCA/WIN to do so.

System Awards Management Registration (SAM)

SEMCA/WIN will require the proposer selected to register under the federal government's System Award Management, accessible by visiting SAM.gov. This registration must be complete, and the organization must be searchable on the site prior to contract execution.

Right to Negotiate

SEMCA/WIN will require the proposer selected to participate in negotiations and to submit any price, technical, or other revisions of their proposals as may result from negotiation.

Right to Request Additional Information

SEMCA/WIN reserves the right to request any additional information that might be deemed necessary after the completion of this document.



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System Design Costs

The successful bidder shall be responsible for all design, information gathering, and required programming to achieve a successful implementation. This cost must be included in the base bid.

Pricing Eligibility Period

All vendor proposal bids are required to be offered for a term not less than 120 calendar days in duration.

Additional Charges

No additional charges, other than those listed in the proposed cost breakdown, shall be made. Prices quoted will include verification/coordination of order, all costs for shipping, delivery to all sites, unpacking, setup, installation, operation, testing, travel, cleanup and training.

Federal or State Sales, Excise, Or Use Taxes

Owner does not pay sales use tax. All other taxes, fees, permits and shipping costs, etc. shall be included.

Contract Requirements

SEMCA/WIN considers this RFP legally binding and will require that this RFP and the resulting awarded vendor Proposal and any amendments be included as addenda to any subsequent contracts between the Vendor(s) and SEMCA/WIN. It should be understood by the Vendor(s) that this means that the Owner expects the Vendor(s) to satisfy substantially all requirements and reports listed herein. Exceptions should be explicitly noted in the Vendor Proposals. Lack of exceptions will be considered acceptance of all of the specifications as presented in this RFP.



REQUEST FOR PROPOSALS
Cover Sheet & Signature Page

Response to Request for Proposals for:

Name of Bidder / Organization	
Street Address	
City	
State / Zip	
Phone Number	
Email Address	

E-mail this cover page and proposal to
Kinsey.Mantay@WINintelligence.org



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Cover Sheet & Signature Page

Please complete this form and return as part of the Request for Proposal.

Bidding under the name of: _____

Federal Employer Identification Number: _____

Which is (check one of the following):

- Corporation, incorporated under the laws of the State of _____
List all officers and stockholders:

- Assumed Name (Register No. _____)
Individual
Partnership

Is any owner, partner, stockholder or employee of the company or institution completing this Request for Proposal associated with or have a family member working with WIN/SEMCA, or an administrative employee of the WIN/SEMCA?

- Yes
No

If yes, who: _____

I certify that this proposal is a firm offer to begin Program Year 2019 and that complete and accurate records justifying all expenditures, leaving a clear audit trail to point of origin will be maintained, subject to periodic audit by the Workforce Intelligence Network for Southeast Michigan/Southeast Michigan Community Alliance. I further certify that I have read and understand the specifications preceding this application.

NOTE: This document must be signed by the individual who has signatory authority for the organization under whose sponsorship this proposal has been submitted.

Signature

Date

Name

Title



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Risk Assessment Questionnaire

<p>In accordance with Office of Management and Budget (OMB) Title 2 CFR Part 200.331 WIN/SEMCA, is responsible for evaluating its contractors for risk.</p>	<p>Contractor Representative Completing this questionnaire:</p>	<p>(To be completed by WIN/SEMCA)</p>		
<p>Please provide responses to the questions that follow:</p>	<p>Name of Contractor</p>	<p>FEDERAL AWARDING AGENCY</p>		
		<p>GRANT</p>		
		<p>CFDA#</p>		
		<p>RISK ASSESSMENT</p>		
		<p>Comment</p>	<p>Low 1</p>	<p>Medium 2</p>
<p>1. Prior to receiving funding from WIN/SEMCA, had your organization received a federal grant (directly or indirectly) within the past five years? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when? _____ Description of grant:</p>				



Request for Proposals

Risk Assessment Questionnaire

<p>2. Has your organization previously been required to submit to a compliance audit or Single Audit as required by OMB A-133, Title 2 CFR Part 200 or the cognizant agency? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, provide the single audit. This attachment does not apply to maximum page count.</p> <p>Was the award determined to be a major federal program in the audit? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>				
<p>3. Were there any findings resulting from the single audit? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>				
<p>4. Does the individual (or team of individuals) with primary responsibility for grant-related financial activities have prior experience with federal grants? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, describe.</p>				
<p>5. Does your organization have written policies and procedures related to internal controls and oversight? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>				
<p>6. Has your organization had new or substantial changes to its operating structure/systems or has new personnel? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>				

OVERALL RATING BASED ON SCORING (6 TO 8 = "LOW", 9 TO 13 = "MEDIUM", OVER 14 = "HIGH"):