



## **REQUEST FOR PROPOSAL**

*Instructions for  
Request for Proposal for  
Registered Apprenticeship Standards Holding (Sponsorship)  
Contract Period: February 2017 thru December 2017*

**Proposal due February 10, 2017**

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## Section 1-RFP Contacts and Important Dates

### Authorized agency contact

The authorized agency contact person for all matters concerning this request for quote is:

Lisa Katz  
Executive Director  
Workforce Intelligence Network  
313-744-2946  
Lisa.katz@win-semich.org

### Timetable

- A. Release date:** January 30, 2017
- B. Questions due for bidders conference:** February 6, 2017  
Questions regarding this RFP will not be answered outside of this bidder's conference. Interested parties should submit questions via e-mail to [lisa.katz@win-semich.org](mailto:lisa.katz@win-semich.org). Enter "Registered Apprenticeship Standards Holding Inquiry" in the subject line of the e-mail.
- C. Online Bidders Conference:** February 7, 2017  
An online bidder's conference will be held February 7, 2017 from 2:00pm-3:00pm EST.  
  
Bidders Conference Access:  
Tues, Feb 7, 2017 2:00 PM - 3:00 PM Eastern Standard Time  
Please join my meeting from your computer, tablet or smartphone.  
  
E-mail inquiries will be accepted, but all questions will be addressed during the bidder's conference. Answers will be provided to those attending the bidder's conference.
- D. RFP due date and submission:**  
  
Date: February 10, 2017  
Time: Close of business (5:00 PM) Eastern Standard Time  
Delivery method: E-mail responses to [lisa.katz@win-semich.org](mailto:lisa.katz@win-semich.org). Please specify "WIN Apprenticeship Standards Holding" in the subject line.

Quotes that are not received via e-mail by the due date and time will be considered late and may be excluded from the review process. WIN is not responsible for any technical issues that may occur.

### E. Contract and Payment Schedule

Upon receipt of a competitive quote and confirmation of available project funds, WIN and project partners will select a vendor and set contract terms, including payment schedule. A monthly invoiced, payment schedule is anticipated.

## Section 2- Statement of Purpose and Background

### **Statement of Purpose:**

Workforce Intelligence Network for Southeast Michigan (WIN) is issuing this request for proposal seeking to outsource programming resources to assist in the following:

1. Training WIN project staff to hold (sponsor) Registered Apprenticeship Standards,
2. Hold Registered Apprenticeship Standards for WIN and AMCAI Partners on an interim basis while training of project staff is taking place.
3. Providing technical assistance to project staff during the 1<sup>st</sup> phase of standards holding to ensure success.

Access to training and technical assistance would be required from the initiation of a contract until December 31, 2017, whereas access to software and system guidance would be required until December 31, 2020. Services will include:

1. Training internal staff on the standards holding process including but not limited to writing standards, registering standards, amending standards, adding standards, management and oversight of standards, and reporting functions. This will include weekly training sessions to teach a newly hired WIN staff member how to hold and manage Registered Apprenticeship standards. Training to be completed by December 31, 2017.
2. Access to standard holding system and software from initiation of contract to December 31, 2020. Access to this system and software is expected to be unlimited for WIN staff and is likely to support work related to the scope of work for this RFP, but may also be used for other projects during the subscription period.
3. Technical assistance for 1<sup>st</sup> phase analysis through December 2017, which should include on-call assistance for standard holding related needs.

Training and technical assistance would be completed by December 2017 and access to the system and any software would be required from initiation of a contract until December 31, 2020. If funding is identified, a continuance of access to software may be desired. Please include rates for continuing software access and use in your proposal after December 31, 2020.

### **Background:**

In October 2015, WIN was identified as an awardee in a federal grant from the Department of Labor Employment and Training Agency to provide an expansion of Registered Apprenticeships to firms and workers in a 13-county region in Southeast Michigan affected by past manufacturing and economic downturn. A key subtask of this initiative is a better regional network for employers and apprentices to expand and sustain Registered Apprenticeship in Michigan.

### **Problem Statement:**

A successful, regional Registered Apprenticeship ecosystem is dependent on a strong network of engaged and aligned partners. Ideally, partners will work together within the industrial sectors and clusters to coordinate information sharing, seek collaborative opportunities and maximize and expand the workforce. However, there are serious challenges to achieving this, for example: collaboration can be challenging across geographies or among partners who have not traditionally worked together before. While Registered Apprenticeship has a strong history and tradition in Michigan through the UAW and other labor unions, many smaller manufacturing companies and employers in other industries are not familiar or comfortable with the Registered Apprenticeship process. One of the barriers to this has been the process of registering and holding standards.

### **Overview of the Workforce Intelligence Network for Southeast Michigan:**

WIN is a partnership of 10 community colleges and 6 Michigan Works! Agencies in Southeast Michigan. It was founded with the support of the New Economy Initiative for Southeast Michigan and publicly launched in November 2011. WIN's mission is to cultivate a talent system dedicated to helping employers find the talent they need for success. WIN specializes in fostering collaboration among talent partners, including workforce development, community colleges, four-year postsecondary institutions, K-12 schools, economic development organizations, government, community based organizations, employers, and others. Activities at WIN are centered on three goals: data, employer strategies, and policy. WIN covers a 16-county area, including Genesee, Hillsdale, Huron, Jackson, Lapeer, Lenawee, Livingston, Macomb, Monroe, Oakland, Sanilac, Shiawassee, St. Clair, Tuscola, Washtenaw and Wayne.

## **Section 3- Scope of Work and Deliverables**

### **Scope of Work:**

To overcome these challenges, WIN will integrate a Registered Apprenticeship Standard Holding Coordinator position supporting the regional (southeast Michigan) manufacturing, information technology, intelligent transportation, and other industries. Registered Apprenticeship standard holding will offer a different option for employers in our region seeking alternatives to holding standards through the Department of Labor themselves.

### **Deliverables:**

- Assistance with identifying the necessary functions of a Registered Apprenticeship Standard Holding Coordinator. (Due in the first two weeks of contract)
- A job description which includes skills and abilities pertaining to standard holding and Registered Apprenticeship services. (Due in the first two weeks of contract)
- Training and access to standard holding systems and software, developed by the bidder prior to proposal submittal.
- Training to utilize standard holding processes and systems.
- Training and technical assistance managing standards and standard holding, including after the WIN Standard Holding Coordinator is in place.
- Holding of Registered Apprenticeship standards in the interim time between contract initiation and full implementation and autonomy of the WIN Standard Holding Coordinator.

**Goal:** The intent will be to establish a baseline understanding of the Registered Apprenticeship standard holding process, with a deliberate focus on improving that process over time. This RFP is the vehicle to identify a qualified and experienced organization to teach WIN program staff to perform Registered Apprenticeship standard holding and provide access to a standard holding system that has already been developed and tested.

## Section 4- Proposal Format, Review Process, and Evaluation

### **Proposal Format:**

In order 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. Use narrative and/or include attachments where requested. Adherence to this format is essential since evaluation criteria is based on the structure of the RFP. Failure to follow the requested format could 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 aforementioned deliverables. The proposal should be no longer than twenty (20) pages total and include the following:

1. Cover Page (form included in this RFP)
2. Executive summary
3. Methodology-Training and software
4. Past performance
5. Staffing
6. Proposed timeline with milestones
7. Total Project costs
8. Completed bidders signature sheet (form included in RFP)
9. Completed Risk Assessment questionnaire (Form included in RFP)

### **Bid Review Process**

The application is a preliminary mechanism used to determine the suitability of a service provider for funding. The review process involves:

A. *Preliminary Screening*

To be considered for funding you must complete the entire application. Based on your response, an evaluation team will determine whether further 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 demo 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 a formal evaluation committee. Vendors with the top proposals may be asked to participate in an interview or asked to provide further information/clarification. Recommendations from the WIN Evaluation Committee will be made to the Advance Michigan Center for Apprenticeship Innovation for final approval.

### **Proposal Content and Evaluation**

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

- Methodology: 30 points maximum, Five (5) pages maximum  
The ability to train a new WIN staff member, and provide interim standard holding functions.

Fifteen points (15) maximum is awarded for methodology of training and standard holding delivery. Does the proposal provide clear and concise direction on how they will train project staff? Does the applicant have the capability to perform all of the services outlined in Section I of the Instructions, "Services to be provided"? Does it have additional capabilities? Are a number of milestones identified in the proposal in order to assess progress and spread out payment for services? Is the standard holding system that will be used proven in other instances? Is it easy to access? How will the relationship with WIN be managed? Provide a list of any assumptions made. Please also include any subcontractors or partners you will be utilizing to support your proposal.

- Past Performance: 15 points maximum, Four (4) pages maximum  
Please provide an organizational overview of experience, links to relevant products (past and present) and otherwise demonstrate credentials and capacity to perform the desired work and achieve identified goals. Due to the scope of services required to be performed, experience and demonstration of past performance is critical. Is software developed and tested? Is the level of risk associated with the potential third party vendor considered reasonable? Provide 3 references from past contracts of similar work. Please provide the same information for any individuals or businesses outside of your own organization that will be contracted for any portion of this project.
- Staffing: 25 points maximum, Five (5) pages maximum  
WIN expects the service provider to have professional staff presently in their employ who have credentials (education and/or experience) and to be knowledgeable and capable of performing the required services.

Provide a description of the firm, including resumes and professional qualifications of the principals involved in administering the project. Do not include the resumes and professional qualifications for individuals who will not be assigned to the project.

1. Provide a list of staff members who will be assigned to the project, including names, titles, phone number, email address, role in the project and their specific experience.
2. Provide a description of completed projects that demonstrate the firm's ability to complete projects of similar scope, size, and purpose. Include information about the firm's ability to complete projects in a timely fashion and within budget.

- Timeline: 10 points maximum, Two (2) pages maximum  
Does the proposal meet the timelines specified? Is the time estimated to train WIN staff and provide interim standards holding reasonable? Are there specific target dates and/or an implementation schedule? Are specific milestones identified in order to evaluate progress? Provide a list of any assumptions made regarding the timeline.
- Total Cost: 20 points maximum, Three (3) pages maximum

Since the basis of the award to service providers is a competitive process, the Workforce Intelligence Network expects to fund the service provider who delivers the best quality of service at the most cost effective price. Does the program and administrative costs align with the proposed objectives?

Proposers must submit a line item budget accounting for the total funding request for any resources, tools, professional development, software subscription, or other expenses. Complete a line item budget for each cost category covered in your proposal. If you are a private-for-profit organization you must identify the amount of profit that is being charged to the Workforce Intelligence Network. Funding may be requested to cover costs in two general categories:

- Administrative costs refer to salaries, wages, fringe benefits and related costs of the overall program management, program coordination, and general administrative functions.
- Program costs refer to all costs not attributed to administrative costs. This can include costs such as travel, registration fees, meeting fees, etc.

Present a budget for the delivery of the services described in this Request for Proposal for the first portion of this project (*February 2017 thru December 2017*). This is a fixed cost, reimbursement only project. Please include a quote for access to software following the completion of the grant, as a contract modification may be considered.

Include the following information in this line item budget:

- Total cost of proposal
- Administrative Costs with hourly rates. Include salaries/wages and fringe benefit costs separately.
- Program Costs with hourly rates. Include salaries/wages and fringe benefit costs separately.
- Project costs with method of determining costs.
- Please describe proposed payment reimbursement periods by time and project milestones.
- List any anticipated in-kind or leveraged contributions to this work.

### Evaluation Scoring

Methodology – Training	<b>15</b>
Methodology – Software	<b>15</b>
Past Performance	<b>15</b>
Staffing	<b>25</b>
Timeline	<b>10</b>
Total Cost	<b>20</b>
<b>Total Points</b>	<b>100</b>

**Please do not add any additional attachments.**

## Section 5- Required Forms

The three following forms must be completed and submitted with proposals. These forms will not count towards the total page limit.



### **Workforce Intelligence Network for Southeast Michigan**

#### **Cover Page**

*Response to  
Request for Proposal*

*Application for Registered Apprenticeship Standards Holding  
February 2017 thru December 2017*

E-mail this cover page and proposal to *[lisa.katz@win-semich.org](mailto:lisa.katz@win-semich.org)*.

#### **Identifying Information**

- A. \_\_\_\_\_  
Name of Organization
- \_\_\_\_\_
- Street Address
- \_\_\_\_\_
- City State/Zip County
- B. \_\_\_\_\_  
Contact Representative and Title
- C. \_\_\_\_\_  
Phone Number
- D. Type of Organization:  Public School     Private Non-Profit  
 Private for Profit     Community-Based Organization  
 Community College  Other (specify) \_\_\_\_\_

The Workforce Intelligence Network 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, the Workforce Intelligence Network will contract with one organization to provide the deliverables as outlined in this Request for Proposal.

**Bidder's Signature Sheet**

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 serving on the Workforce Intelligence Network, or Workforce Intelligence Network Board, or an administrative employee of the Workforce Intelligence Network, or Workforce Intelligence Network?

- Yes
- No

If yes, name of company member: \_\_\_\_\_

I certify that this proposal is a firm offer to begin Program Year 2017 (February 2017) 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, the Workforce Intelligence Network for Southeast Michigan, Southeast Michigan Community Alliance, the County of Macomb and/or State of Michigan. 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.

Authorized Signature: \_\_\_\_\_

Printed or Typed: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Date: \_\_\_\_\_

If another individual is authorized to sign contracts as a result of this proposal, indicate:

Name of Authorized Individual (type): \_\_\_\_\_

Signature of Authorized Individual: \_\_\_\_\_

When payment on such contract is to be directed to the same company at an address different from above, fill in that address:

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**RISK ASSESSMENT QUESTIONNAIRE**

<p>In accordance with Office of Management and Budget (OMB) Title 2 CFR Part 200.331 Workforce Intelligence Network, is responsible for evaluating its contractors for risk.</p> <p>Please provide responses to the questions that follow:</p>	Contractor Representative Completing this questionnaire:	(To be completed by WIN)			
	Name of Contractor	FEDERAL AWARDING AGENCY			
		GRANT			
		CFDA#			
		<b>RISK ASSESSMENT</b>			
	Comment	Low 1	Medium 2	High 6	
<p>1. Prior to receiving funding from Workforce Intelligence Network, via Macomb/St. Clair Workforce Development Board, through Macomb County, had your organization received a federal grant (directly or indirectly) within the past five years?</p> <p><input type="checkbox"/>Yes <input type="checkbox"/> No</p> <p>If yes, when? _____</p> <p>Description of grant:</p>					
<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?</p> <p><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?</p> <p><input type="checkbox"/>Yes <input type="checkbox"/> No</p>					
<p>3. Were there any findings resulting from the single audit?</p> <p><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?</p> <p><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?</p> <p><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?</p> <p><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"):**

## Section 6- General Terms and Conditions

### **Selection of Service Provider**

The Workforce Intelligence Network will comply with all federal and state mandates governing service provider selection including federal guidelines 2 CFR 200. Due to the funding source for this project (federal grant from the Department of Labor), contractors are required to abide by the same standards and regulations (2 CFR 200).

To be considered for funding, service providers 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. The ability to meet performance goals;
4. A satisfactory record of past performance;
5. The ability to provide services that can lead to the achievement of competency standards for customers; and
6. A satisfactory record of integrity, business ethics, and fiscal accountability.

### **Grievance Policy**

The Workforce Intelligence Network 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 same is acknowledged by acceptance of a contract from the Workforce Intelligence Network.

### **Profit**

Public and private nonprofit entities will be required upon the completion of a contract to report their actual operational costs of the contract to Workforce Intelligence Network by line item. If the Workforce Intelligence Network has paid the public or private nonprofit entity more than the actual operational costs, the entity must return all revenues in excess of costs to the Workforce Intelligence Network. Further, a private-for-profit entity must identify profit (fees or other revenue in excess of actual costs) in their line item budget, in accordance with federal mandates that require assurances that profit is reasonable and allowable.

### **Program Income**

Income earned by the contractor as a result of contracts entered into with the Workforce Intelligence Network is program income. Program income includes income from fees for services performed and from conferences, usage or rental fees, sale of commodities or fabricated items, interest earned on funds, and reimbursed awards for public or private nonprofit entities that were in excess of the actual costs incurred in providing services specific to any contracts developed for the work identified in this RFP. Program income in excess of contract costs shall be declared by the host site, but may be used to support the sustainability of the social network analysis project.

### **Right to Refusal and Proposal Preparation Costs**

This preliminary application does not commit 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. The Workforce Intelligence Network 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 the Workforce Intelligence Network to do so.

### **Right to Negotiate**

The Workforce Intelligence Network contracting officer 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**

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

**System Design Costs**

The successful Vendor 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**

WIN considers this RFP legally binding and will require that this Request for Proposal and the resulting awarded vendor Proposal and any amendments be included as addenda to any subsequent contracts between the Vendor(s) and Workforce Intelligence Network. 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