

REQUEST FOR PROPOSAL

CWA TRAINING INSTITUTE

September 1, 2017



## Table of Contents

1. Summary.....	3
2. Background of Organization.....	3
3. Proposal Guidelines and Requirements .....	3 - 4
4. Contract Terms .....	4
5. Purpose and Objectives .....	5
6. Timeline .....	5
7. Budget .....	5
8. Scope & Guidelines .....	6
9. Staff Resources .....	6
10. Qualifications .....	7
11. Format for Proposals .....	7-8
12. Evaluation Criteria .....	9
13. California Training Institute Technical Assistance Categories.....	10 - 11

## 1. SUMMARY

The California Workforce Association (CWA) is accepting proposals to offer capacity building to the Workforce Development system in California. The purpose of this RFP is to provide a fair evaluation for all candidates in order to establish a list of trainers in key topic areas that can be accessed by California's workforce development system.

CWA is soliciting qualified individuals and organizations to provide a full range of training and capacity building services related to the workforce development system in California.

## 2. BACKGROUND OF ORGANIZATION

### **Our Mission**

CWA has in its membership the 45 Workforce Development Boards (WDBs) in the state of California, whose Directors serve as our Board, along with a WDB Member representative. We also have affiliate members, which include Chambers of Commerce, post-secondary and K-12 education organizations, community based organizations, private training providers, and other workforce development stakeholders. CTI is solely for use by CWA's Members and affiliate members.

In addition, CWA has been awarded the Partnerships, Technical Assistance, & Training grant to support and coordinate regional training across California's 14 Regional Planning Unites through 14 designated Regional Training Coordinators. All 14 Regional Training Coordinators have submitted regional training plans to be administered over the course of PY 17-18. Funding for this effort is being supported by the California Workforce Development Board.

### **2a. Brief Background on Organization**

The California Workforce Association (CWA) is the premier organization for providing capacity building, leveraging partnerships, and facilitating dialogue to strengthen the Local Workforce System in the state.

Local Workforce Systems are where industry connects with workforce to promote economic development and gainful employment for all.

Our vision for California's Local Workforce System consists of the following:

- Promote Regional Work, focusing on Demand Sectors to promote Regional Economic Development
- Increase usage of Earn and Learn Models, such as Apprenticeship, WEX, and OJT
- Develop Skills and Credentials of Incumbent Workers to help increase Income Mobility
- Develop Career Pathways starting with K-12 and through a person's work life
- Share Common Benchmarks across Stakeholder groups to produce greater outcomes and enhance partnerships
- Build the capacity of California's workforce system utilizing predetermined training topics to implement the State, Local, and Regional Plans.

## 3. PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals received after 5:00 PM PST, Friday, September 29<sup>th</sup>, 2017, will not be considered.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

The price you quote should be based on an hourly fee or daily rate. The fee must be inclusive, including CWA's 15% admin fee in the price, with the knowledge that 10% more will be added if individual registration pages must be developed by CWA for the training rather than a single billing for a flat fee. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

If the execution of work to be performed by your company requires the hiring of sub-contractors, you must clearly state this in your proposal. Sub-contractors must be identified and the work they will perform must be defined. In your proposal please provide the name, address, and EIN of the sub-contractor. CWA will not refuse a proposal based upon the use of sub-contractors; however we retain the right to refuse the sub-contractors you have selected.

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

This RFP does not commit the California Workforce Association, its members, local workforce boards or any other party to award a contract and may be withdrawn, amended or modified at any time at the sole discretion of CWA. CWA will not pay any costs incurred in the preparation, submission or consideration of a Proposal to this RFP, nor any other costs of any kind incurred prior to the effective date of a contract awarded by CWA.

## **4. CONTRACT TERMS**

Successful bidders will be added to the CTI webpage. Agreements that outline CTI terms will be executed with each successful bidder for a period of one year, with the possibility of an additional one year extension.

CWA will negotiate individual contract terms upon selection by one of CWA members and/or Regional Training Coordinator. All contracts are subject to review by CWA legal counsel, and a project will be awarded upon the signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

## 5. PURPOSE AND OBJECTIVES

### Purpose

Prior to the formation of CTI, capacity building and technical assistance offerings to the workforce development system in the state of California were inconsistent, misaligned, and often difficult to administer across communities and regions. CIT enables CWA to streamline the offering of capacity building and technical assistance training to the field and, additionally, to a wider variety of potential organizations, including partners who have an interest in these training sessions with the advent of WIOAs implementation.

Additionally, the 14 Regional Training Coordinators have developed regional training plans for capacity building at every level of the regional workforce system. This includes core competencies for AJCC Staff, AJCC Management, LWDB Support Staff, and LWDB Members. CWA's California Training Institute will be the training platform used to fulfill this training need.

### Objective

Our primary objective is to develop a stronger, more strategically aligned and easily accessible, fully-procured system of capacity building and technical assistance for California's workforce development system which encompasses all of the training topics requested from the Regional Training Coordinators.

### Our Vision

- Fully procured capacity building and technical assistance training offerings posted on the CWA Training Institute website.
- Procurement will allow CWA to provide the best pricing and highest quality training to the field.
- CWA will promote the Training Institute not just to the typical partners and Regional Training Coordinators, but to new partners who may have an interest in said trainings with the advent of WIOA, thereby adding additional opportunities for Training Institute providers to provide their services.
- CWA will promote the Training Institute and Training Institute providers heavily at conferences and various meetings around the state.
- CWA has entered into agreements with the state of California to provide training for state, regional, and local organizations associated with workforce development, and the Training Institute will be the centerpiece of those discussions, again giving Training Institute providers the potential for growth with their reach in the state.
- CWA will make contact between the trainer and the contracting organization through the Training Institute, and will enter into contractual agreements with both parties.
- CWA will handle all payments. For lump-sum payments, CWA will pay the trainer within 30 days of receiving payment from the contracting organization. For individually registered sessions, CWA will pay the trainer within 30 days after receiving all payments from individuals registered for the training class.
- Regional Training Coordinators will utilize a wide variety of capacity building training topics along with a list of standardized training core curriculums specifically developed for AJCC Staff, AJCC Management, WDB Staff, and WDB Leadership and Members.

## 6. TIMELINE

RFP Released	9:00 AM Friday September 1 <sup>st</sup> , 2017
RFP Due Date (Proposals accepted until:)	5:00 PM, Friday, September 29 <sup>th</sup> , 2017
RFP Evaluation	October 2 <sup>nd</sup> – 20 <sup>th</sup> , 2017
Announcements	Firms that meet the criteria to be listed on the CTI will be notified at any point during evaluation period.

Contract Negotiation	Contract negotiations will begin when a project and/or service is identified.
----------------------	---

## 7. BUDGET

Applicants must present their full pricing for services offered, including CWA’s 15% admin fee for operation and marketing of the Technical Institute. Please note that if registration pages are required for a training session, CWA will charge an additional 10%, added to the fee presented. If your price excludes certain fees or charges; such as travel, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

Note: If a training is requested utilizing the Regional Training Coordinator and regional training coordination funds (PTAT), the CWA admin fee will not be included.

## 8. SCOPE & GUIDELINES

Professional services will include, but are not limited to, the following:

**Training:**

Consultant shall serve as the trainer of record and notify CWA of any use of sub-contractors.

**Development of Training Materials:**

Consultant will develop and provide all training materials for the training sessions.

**On-site Logistics:**

Following CWA contracting with the trainer/consultant and the organization seeking training, the trainer/consultant will work directly with said organization on specific on-site logistics requirements. Any on-site logistics requirements should be included in response to the RFP, to be listed on the CWA Training Institute website.

## 9. STAFF RESOURCES

CWA’s core team for the California Training Institute includes:

**Project Lead:** Responsible for sign-off on key decisions, providing project steering and maintaining relationships with outside stakeholders (CWA Staff Leadership Team, Board Members) – Bob Lanter, CWA

**Program Director:** Responsible for maintaining the CWA Training Institute website, developing contracts and marketing the Training Institute. Maintains communication between other team members and responsible for accepting and scoring proposals to this RFP; and reviewing proposals for completeness – Matt Hidalgo, CWA

## 10. QUALIFICATIONS

The ideal Consultant will:

- Have at least five (5) years of direct experience providing training to the workforce development field;
- Have no professional and/or ethical conflict with CWA's interests;
- Have a demonstrated and verifiable track-record;
- Have independently verifiable references of work;
- Flexibility with Training Curriculum to allow members to customize training when necessary
- Be fully dedicated to the goals and objectives of CWA's Training Institute project.

## 11. FORMAT FOR PROPOSALS

All proposals must provide specific and succinct answers to all questions and requests for information. Indirect, imprecise, or incomplete responses can serve only to the disadvantage of the proposer. Please answer the questions in the format and order presented. (Submissions of individual resumes alone will not be considered responsive to any specific question).

### **Title Page:**

CWA, California Training Institute Proposal, your company name, address, web site address, telephone number, fax number, e-mail address and primary contact person.

### **Cover Letter:**

Signed by the person or persons authorized to sign on behalf of the company (1 page).

### **Organizational Overview and Experience**

- a) Organizational Overview – please describe your organization including mission.
- b) List all training sessions you would like to be considered for, with information for each training session on:
  - a. Summary of curriculum (see example: **Attachment C**)
    - i. Trainings and facilitations must incorporate standardized core competencies into training topics. (**See Attachment A for detailed list of Core Competencies**)
    - ii. All trainings must indicate which training topic they relate to. (**See Section 13**)
  - b. Ideal class size
  - c. Minimum class size (if applicable)
  - d. Maximum class size
- c) Define how you will assess knowledge at the beginning and conclusion of the training in order to track the comprehension of trainings. (**See attachment B for example survey**)
- d) Define the standard time frames for response to an inquiry from CWA upon a contract request from an interested party.
- e) Describe the preferred method for transmittal of requests and other material from CWA.
- f) Describe in detail the efforts you will undertake to achieve client satisfaction and to satisfy the requirements of the Scope of Services section.
- g) Explain your understanding of the current challenges of workforce development system as it pertains to the training areas that you are proposing.
- h) Please list all clients for which you or your firm previously provided training services for over the last two years.

**Staff Qualifications:**

Attach bios that describe overall capabilities, qualifications, training, and areas of expertise for each of the trainers/partners/principals and associates that may be assigned to conduct the training including but not limited to:

- a. A biography for each designated individual.
- b. Length of employment with the firm;
- c. Specialization;
- d. Scholastic honors and professional affiliations;
- e. Knowledge of, and expertise with, federal and state issues; and
- f. Years and experience with various types of clientele.

**Budget:**

- a) For each training topic listed in organizational overview, please submit a budget for session notating final pricing (including 15% admin fee).
- b) If expenses are excluded in the budget, such as travel, please specify.

**Submission:**

An emailed copy of your proposal must be received no later than 5:00 PM PST, Friday September 29, 2017. Your proposal must include a cost proposal as described above.

Deliver proposals to:

**Matt Hidalgo**

[mhidalgo@calworkforce.org](mailto:mhidalgo@calworkforce.org)

**Subject Line: Response to RFP on California Training Institute**

Matt Hidalgo, Program Director for the California Workforce Association, is managing the RFP process for the California Training Institute. All communications on this proposal, including final selection, contract award, all reports and communications shall go directly through the assigned CWA staff unless otherwise stated or requested.

**Matt Hidalgo**

**1107 9<sup>th</sup> Street, Suite 801**

**Sacramento, CA 95841**

**(916) 325-1610**

[mhidalgo@calworkforce.org](mailto:mhidalgo@calworkforce.org)

**Appeals:**

All appeals must be submitted in writing to Bob Lanter, 1107 9<sup>th</sup> St, Suite 801, Sacramento, CA 95841. If necessary, a second appeal can be submitted in writing to CWA Board of Directors at the same address as above.

**Bidder's call:**

CWA will hold a Bidder's conference call on **Wednesday, September 13, 2017 at 1:00pmPT**, to answer questions relative to the RFP process. The call will be recorded and made available on the CTI Webpage at calworkforce.org. **Conference Number: 712-775-7031 | Access Code: 866-177**

## 12. EVALUATION CRITERIA

Projects will be scored individually as outlined below.

RFP COMPONENT	Points
SECTION I – COVER PAGE	5
SECTION II – ORGANIZATIONAL OVERVIEW/EXPERIENCE	30
SECTION III – STAFF QUALIFICATIONS	35
SECTION IV – BUDGET	30
<b>TOTAL</b>	<b>100</b>

A review panel will evaluate all RFPs received. Successful proposals will have received a minimum of 80 points to be accepted to CTI. It is understood and accepted by Respondent that all decisions and the degree to which a Proposal meets the evaluation criteria and the overall needs of the Association and its members are within the purview and judgment of CWA staff and its Board of Directors.

Following release of this RFP through the completion of the evaluation process, respondents should not contact CWA members or CWA staff charged with oversight of this project to avoid conflicts of interest, appearance of conflicts of interest, or undue influence over the process. Comments, questions or clarifications regarding this RFP may be handled through the CWA Program Director below:

**Matt Hidalgo**  
**1107 9<sup>th</sup> Street, Suite 801**  
**Sacramento, CA 95841**  
**(916) 325-1610**  
[rfp@calworkforce.org](mailto:rfp@calworkforce.org)

During the evaluation process, CWA reserves the right, where it may serve CWA's best interest, to request additional information or clarification from proposing firms, or to allow corrections of errors or omissions. In addition, qualifications and references of the top firms will be verified. Personal interviews of the top candidates may be conducted

Selected Respondents may be invited to participate in oral presentations and/or interviews as deemed necessary by the Proposal evaluation panel. All Respondents are advised to be prepared for a presentation and/or interview on short notice. Oral presentations/interviews will be based on Respondents' Proposal and shall not include any new information or presentation not included in the Proposal. The individual that will be directly responsible for carrying out the contract, if awarded, should be present at the oral interview.

A representative of CWA will negotiate the terms and conditions of a contract with the selected firm upon being chosen as a service provider by a CWA member organization. The contract will require that the firm maintain general liability, professional liability, automobile, and workers' compensation (if necessary). The contract will also contain certain provisions requiring the selected firm to indemnify CWA. Provisions will also be included in the contract allowing CWA or the member inquiring for the service to terminate the agreement, at its sole discretion, upon the provision of notice.

### 13. CALIFORNIA TRAINING INSTITUTE TECHNICAL ASSISTANCE CATEGORIES

Available opportunities for training are in the following categories. Please apply for as many specific training opportunities as you or your firm would wish to apply for, using the guidelines listed above. Note: These training topics have evolved since the original creation of the California Training Institute. This is to better align with the **14 Regional Training Coordinator** training requests for regional Capacity Building. Please indicate which training topic or topics your trainings falls under; if it covers more than one subject, please indicate all that apply in your proposal.

- Accessibility of the AJCC with regard to individuals with disabilities
- Alignment of Workforce Investment, Education, & Economic Development
- Board Development
- Business Services and Employer Engagement
- CalJOBS – System Training (System Monitoring and Compliance)
- CalJOBS Training – System Operations Training
- Career Pathway Development
- Career Planning
- Change Management for Supervisors in Multi-Agency Environment
- Conflict Resolution
- Continuous Quality Improvement (CQI)
- Coordinating Service Delivery for Target Populations
- Cost Allocation
- Cost Sharing Negotiation
- Customer Career Assessment and Planning
- Customer Process Flow Development
- Customer Service Orientation
- Customer Skills Assessment Strategies
- Data Analytics and Reporting
- Disability Awareness and Sensitivity
- Eligibility
- Facilitation Techniques
- Fiscal and Financial Training
- Forging Relationships with Probation/Mental Health Programs
- Grant Writing, RFP 101
- Human-Center Design
- Integrated Service Delivery
- Leading Organizational Change
- Live Your Brand
- Local Strategic Planning (Alignment with State Standards)
- Measuring and Tracking Performance Goals
- Motivating Staff and Building Capacity
- MOU Partnership Development
- One-Stop Certification
- Performance – Development of Contractual Performance Goals
- Performance – Indicators and Reporting – Meeting Performance
- Performance – Understanding of Contractual Performance Goals
- Procurement
- Quality Career Development Coaching
- Regional Strategic Planning
- Sector Strategy Development
- System Monitoring and Compliance
- Time Management and Project Management
- Understanding Labor Market Information
- WIOA 101
- WIOA 102
- WIOA Budget and Principles Allocation
- Work Experience