

REQUEST FOR PROPOSAL

CWA TRAINING INITIATIVE

April 24, 2019

Updated: May 3, 2019



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## 1. PURPOSE

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

CWA is soliciting qualified individuals and organizations to provide training and consulting services related to the workforce development system in California. **Current California Training Initiative (CTI) providers will not need to resubmit proposals; this RFP seeks to augment and amend list of topics by adding new topics, services, and providers.**

Requested topics:

- Transgender Awareness
- Equal Employment Opportunity
- Brown Act Compliance
- Business Process Analysis
- Partnership Development
- Regional Meetings
- Career Pathways
- Certificate Programs involving workforce development

## 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.

CWA's mission is to enhance and inspire California's local workforce development boards and their partners through strategic advocacy, partnership convening, and capacity building

### 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, May 24<sup>th</sup>, 2019**, 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 of all costs, including **CWA's 15% admin fee in the price**. 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. 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 their representatives in regional organizing or regional training work. 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. CTI enables CWA to streamline the offering of training, capacity building and technical assistance training to our members 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. CTI is solely for use by CWA's Members and affiliate members.

### Objective

Our primary objective is to develop a stronger, more strategically aligned and easily accessible, fully-procured list of trainers for capacity building and technical assistance for California's workforce development system.

### Our Vision

- Fully procured training, capacity building, and technical assistance training offerings posted on the CWA's CTI website.
- Procurement will allow CWA to provide the best pricing and highest quality training services to our members.
- CWA will promote the CTI Trainer/Consultant List 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 CTI providers to provide their services.
- CWA will promote the Trainer List and CTI 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 CTI will be the centerpiece of those discussions, again giving CTI providers the potential for growth with their reach in the state.
- CWA will make contact between the trainer/consultant and the contracting organization through the CTI and will enter into contractual agreements with both parties.
- CWA will handle all payments. For lump-sum payments, CWA will pay the trainer/consultant within 45 days of receiving payment from the contracting organization. For individually registered sessions, CWA will pay the trainer/consultant within 45 days after receiving all payments from individuals registered for the training or consulting service.
- Regional Training Coordinators will utilize a wide variety of capacity building training topics and training services 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	Wednesday, April 24, 2019
RFP Due Date (Proposals accepted until:)	5:00 PM, Friday, May 24, 2019
RFP Evaluation	May 27, 2019 through June 21, 2019
Announcements	Firms that meet the criteria to be listed on the CTI will be notified at any point during evaluation period and no later than June 28, 2019.
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 California Training Initiative. 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.

## 8. SCOPE & GUIDELINES

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

### **Training/Consulting:**

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

### **Development of Materials:**

Trainer/consultant will develop and provide all materials for the sessions.

### **On-site Logistics:**

Following CWA contracting with the trainer/consultant and the organization seeking services, 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's CTI website.

## 9. STAFF RESOURCES

CWA's core team for the California Training Initiative 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) – Matt Hidalgo, CWA

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

## 10. QUALIFICATIONS

The ideal Trainer/Consultant will:

- Have at least five (5) years of direct experience providing training in their field of expertise;
- Have a demonstrated and verifiable track-record;
- Have independently verifiable references of work;
- Flexibility with training workplan to allow members to customize training when necessary
- Be fully dedicated to the goals and objectives of CWA's Training Initiative 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 Initiative 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/consulting services you would like to be considered for, with information for each training/consulting service on:
  - a. Description of each training/consulting service offered
  - b. Ideal class size (if applicable)
  - c. Minimum class size (if applicable)
  - d. Maximum class size (if applicable)
- c) Define how you will provide follow-up services to ensure customer satisfaction after the training work is done.
- 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) TRAINERS ONLY: Please list all clients for which you or your firm provided training services for over the last two years.
- i) CONSULTANTS ONLY: Please list your most recent consulting service for **each** topic/category that you would like to be considered for.
  - a. Who was the client?
  - b. When and how long was the project?
  - c. What is the project?
  - d. What was the outcome?

**Staff Qualifications:**

Attach bios that describe overall capabilities, qualifications, training, and areas of expertise for each of the trainers/consultants/partners/principals and associates that may be assigned to conduct the training/consulting 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. 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, May 24, 2019**. Your proposal must include a cost proposal as described above.

Deliver proposals to:

**Xue Lor**

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

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

Xue Lor, Program Associate for the California Workforce Association, is managing the RFP process for Training Services for the California Training Initiative. 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.

**Xue Lor**

**1107 9<sup>th</sup> Street, Suite 650**

**Sacramento, CA 95841**

**(916) 325-1610**

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

**Appeals:**

All appeals must be submitted before **5:00 PM PST, Sunday, June 30, 2019**.

**Bidder's call:**

CWA will hold a Bidder's conference call on **Friday, May 3, 2019 at 10:00amPT to 11:00amPT**, to answer questions relative to the RFP process. Notes from the call will be recorded and made available on the CTI webpage following the completion of the call.

**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 Associate below:

**Xue Lor**  
**1107 9<sup>th</sup> Street, Suite 650**  
**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.