

REQUEST FOR PROPOSAL

CWA TRAINING INITIATIVE

March 22, 2021



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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 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 a full range of 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.**

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 WDBs and their partners through strategic advocacy, partnership convening, and capacity building

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 topic areas 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, April 30th, 2021**, will not be considered.

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

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

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.

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.

CWA will make contact between the trainer/consultant and the contracting organization through the CTI and will enter into contractual agreements with both parties.

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 services to our members and, additionally, to a wider variety of potential organizations, including partners who have an interest in these services with the advent of WIOAs implementation and state initiatives. CTI is solely for use by CWA's Members and affiliate members.

CTI 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 for CTI

- Fully procured training and consulting services posted on the CWA's CTI website.
- Procurement will allow CWA to provide the best pricing and highest quality services to our members.
- CWA will promote the CTI Trainer/Consultant List not just to the typical partners but to new partners who may have an interest in said service with the advent of WIOA, thereby adding additional opportunities for CTI providers to provide their services.
- CWA will promote the CTI 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 and consulting services 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.

6. TIMELINE

RFP Released	Monday, March 22, 2021
RFP Due Date (Proposals accepted until:)	5:00 PM PST, Friday, April 30, 2021
RFP Evaluation	May 3, 2021 through May 28, 2021
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 4, 2021.
Bidder's Call	April 1, 2021 at 10:00 AM – 11:00 AM PST

7. BUDGET & PAYMENT

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. Travel expenses must be reasonable.

CWA will handle all payments. For lump-sum payments, CWA will pay the trainer/consultant after receiving payment from the contracting organization. For individually registered sessions, CWA will pay the trainer/consultant after receiving all payments from individuals registered for the training or consulting service.

8. SCOPE OF SERVICES & REQUIREMENTS

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 RESOURCE

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); 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

Executive Director: Oversees, approves, and signs all CTI agreements – Bob Lanter, CWA

10. QUALIFICATIONS

The ideal Trainer/Consultant will:

- Have at least five (5) years of direct experience providing training and/or consulting services 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 services when necessary
- Be fully dedicated to the goals and objectives of CWA's Training Initiative.

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, contact 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 and areas of expertise.
- b) List all training/consulting services you would like to be considered for, with information for each training/consulting service (see example: Attachment A):
 - a. Description of each training/consulting service offered
 - b. Indicate the topic of your training/consulting service (see Attachment B)
 - c. Ideal class size (if applicable)
 - d. Minimum class size (if applicable)
 - e. 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 such as a survey.
- 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 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/consulting service listed in organizational overview, please submit a budget for session notating final pricing (**including 15% admin fee**). 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 such as travel, you must provide a detailed list of excluded fees.
- b) 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. Travel expenses must be reasonable.

Submission:

An emailed copy of your proposal must be received no later than **5:00 PM PST, Friday, April 30, 2021.**

Your proposal must include a cost proposal as described above.

Deliver proposals to:

Xue Lor

rfp@calworkforce.org

Subject Line: Response to RFP on California Training Initiative

Xue Lor, Program Analyst 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 9th Street, Suite 650

Sacramento, CA 95814

(916) 325-1610

rfp@calworkforce.org

Appeals:

All appeals must be submitted before **5:00 PM PST, Friday, June 11, 2021.**

Bidder's call:

CWA will hold a Bidder's conference call on **Thursday, April 1, 2021 at 10:00am to 11:00am PST**, 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: 515-604-9525 | Access Code: 722225#

12. EVALUATION CRITERIA

Projects will be scored individually as outlined below.

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

A review panel will evaluate all RFPs received. Successful proposals will have received a minimum of 85 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 Analyst below:

Xue Lor
1107 9th Street, Suite 650
Sacramento, CA 95814
(916) 325-1610
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. PIGGYBACK CLAUSE

If approved, for the term of the Contract and any mutually agreed extensions pursuant to this request for bids/proposals, other public agencies or public corporations, including any county, city, town, school district, community college, public utility district or other public corporation or agency within the State of California, may purchase, lease-purchase, or rent the identical items(s) at the same price and upon the same terms and conditions pursuant to any applicable Public Contract or other relative legal Code. For supplemental document, please see Attachment C.

Attachment A

This is only meant as an example. If your proposal is accepted, this will be uploaded to the California Training Initiative Webpage.

(Training/Consulting Title)

Summary: (This can be one to three sentences containing a short description of the training. WIOA 101 might say something like: this training is intended to give a solid foundation of understanding of the basic principles of WIOA.)

Learning objectives (if applicable):

- Introduction to the Five Titles and Six Core Programs
- Brief history of WIOA
- WIOA reporting and performance indicators
- Etc.

Topic: WIOA 101

Ideal Class Size (if applicable): 25

Minimum Class Size (if applicable): 15

Maximum Class Size (if applicable): 35

Topics

Accessibility of the AJCC with regard to individuals with disabilities

AJCC Customer Trainings

Alignment of Workforce Development, Education & Economic Development

Apprenticeship Development

Asset-mapping

Business Services and Employer Engagement

Career Pathway Development

Case Management techniques and best/effective practices

Change Management

Co-enrollment Training

Conflict Resolution

Continuous Quality Improvement (CQI)

Coordination in Serving Target Populations: Re-Entry, ELL, Veterans, Persons with Disabilities

Cost Allocation

Cost Sharing Negotiation

COVID-related Trainings

Customer Process Flow and Integrated Service Delivery

Customer Service Trainings

Customer Skills Assessment Strategies, tools, methods, planning

Data Analytics and Reporting

Disability Awareness and Sensitivity Training

Eligibility of targeted populations for WIOA partners

Race, Equity, Diversity, and Inclusion Trainings

Facilitation Training

Fiscal and Financial Training/Consulting

Forging Relationships with Probation/Mental Health Programs

Grant Writing, RFP 101

Human-Center Design

Justice-Involved Population Training

Leading Organizational Change

Live Your Brand

Local Strategic Planning (Alignment with State Standards)

Managing Remote Teams

Marketing

Measuring and Tracking Performance Goals

Motivating and Building Staff Capacity

MOU Partnership Development

One-Stop Certification

Performance – Development of Contractual Performance Goals

Performance – Indicators and Reporting – Meeting Performance

Performance- Indicators and Reporting

Procurement Development/Training

Regional and/or Local Strategic Planning

Remote Service Delivery

Sector Strategy Development

Services to Youth

Strategic Partnership Development

System Monitoring and Compliance

Time Management and Project Management

Trauma Informed Service Delivery

Understanding Labor Market Information

WIOA 101 • Principles of WIOA

WIOA 102 • Strategy & Implementation

WIOA Budget and Allocation Training

Work Experience Development (Internships, OJT, pre-apprenticeship, etc)

Workforce Development Board Member Trainings

Working with Homeless population

Rationale/Guidance for Piggybacking on California Workforce Association CTI Procurement and Contracts

In FY2015-2016 the California Workforce Development Board funded the California Workforce Association for the Partnership Technical Assistance and Training program utilizing WIOA 15% Governor's Discretionary Grant funding. One of the deliverables in the grant requires that CWA procure training through the California Training Initiative (CTI) system, through a competitive procurement process to develop a list of the "training providers in a variety of topics that are determined in collaboration with state and local workforce development partners and ensure that the selected trainers and sessions are of the highest quality and cost effectiveness." The California Workforce Association has conducted the required procurement of training providers to provide professional development and capacity building for workforce development staff and partners in California. Applications from training providers were evaluated and selected providers were added to the California Training Initiative (CTI) vendor list. Regional Planning Units (RPU)/Local Workforce Development Boards (LWDB) who wish to contract with a CTI training provider or consultant may "piggyback" on the CWA procurement and develop contracts with CTI training providers.

What is Piggybacking

Piggybacking is a contract term used when an agency uses an existing procurement process/ contract from another agency as the justification and documentation to form their own contract directly with the vendor to purchase the same or similar items or services. The agency does not become a signatory to, or participate in, the original contract but instead negotiates a new contract with the vendor based on the initial entity's contract. (In this example, LWDBs piggyback on the CWA CTI contract)

Benefits of Piggybacking

By piggybacking on the CWA CTI procurement and contract, RPU/LWDBs save time and resources by leveraging CWA's successful competitive bidding process instead of conducting a duplicative procurement process in each region of the state. Piggyback contracts represent the most immediate cooperative purchasing resource, and they save administrative costs and create pressure for lower prices.

How to Piggyback

LWDB's should request that CWA provide them with a copy of the procurement documents and the contract between CWA and the CTI Training Vendor that they wish to contract with. They should evaluate the specific contract documents to determine if the competitive process and contract awarded meets their agency's local rules and regulations for contracting. LWDB's should make sure that the local procurement policies allow for piggybacking on another entities procurement and contracting process. LWDBs should:

1. **Be aware of, and comply with, local procurement policies that require additional documentation of procurement.** (Example – consultants/trainers in excess of \$25,000 may need additional bids or board approval, depending on local procurement policies)
2. Identify **contracts of interest** to determine if the specifications are consistent with your need. (Identify CTI Trainers/Consultants of interest and research if they will meet your regional training needs)
3. **Request the contract, award document and any other documents necessary** for your evaluation. (Review CTI RFA, award documents, and contract. Could also interview trainers)
4. If you decide to piggyback, **follow your agency's procedures** to initiate negotiations with the vendor to form a separate contract that is based on your agency's contract specifications. Include documentation of piggyback in your procurement file in case of compliance monitoring.