



**CENTER OF
WORKFORCE
INNOVATIONS**

Request for Proposals

for

Business Services Training

Release Date: October 5, 2022

Turning Research, Relationships, and Resources into Results.

PART I: OVERVIEW

A. About the Organization

Center of Workforce Innovations (CWI) is a 501(c)3 workforce development organization in the Northwest Indiana counties of Jasper, Lake, La Porte, Newton, Porter, Pulaski, and Starke governed by a Board of Directors.

CWI is a multi-faceted organization serving as an intermediary to convene community and industry groups to facilitate solutions, provide data and labor market information, offer information about resources, and seed best practices that assist in formulating solutions. CWI provides programmatic and fiscal oversight the American Job Centers, known as WorkOne in Indiana as well as for sub-recipients of adult education providers and youth oriented workforce providers. Finally, CWI also directly delivers services such as career advising, provides credit recovery programming, and has community learning centers for adult education services.

CWI is issuing this Request for Proposals (RFP) to solicit interest by experienced entities to provide training to our Business Services Team members who work out of the WorkOne offices throughout Northwest Indiana.

B. Questions

Questions relating to this RFP may be submitted prior to deadline of **November 4, 2022**. Questions must be in writing and directed to Tamara Stump, tstump@cwicorp.com

C. Responsive Proposals

To be considered responsive, proposals must meet the following minimum criteria:

1. A proposal with electronic signature must be e-mailed to tstump@cwicorp.com with an **incoming timestamp of 2:00 pm CST, November 18, 2022**. The timely delivery of a proposal is entirely the responsibility of the proposer. Proposals received after the date and time will not be accepted.
2. Providing incomplete or erroneous information or omitting important information could result in disqualification of the proposal or contract termination.
3. Acceptable proposals will meet the specifications contained in this RFP and the requirements of all applicable statutes, regulations, and policies.

D. Selection Process and Contract Award

No changes, modifications, or additions to a proposal may be made by the proposer after the proposal deadline unless requested by Board staff. Proposals will be evaluated by a Proposal Review Panel comprised of CWI staff and other preselected reviewers. Cost Effectiveness will

be a factor in selection criteria. Proposers should not have any communications with the Proposal Reviewers, CWI staff or Board committee members regarding proposals, recommendations or any other issues related to the RFP process. Such communication will disqualify the Proposer.

Contracts may be awarded based on offers received, without discussion of such offers with the proposers. Each offer should be submitted in the most favorable terms, from a price and technical standpoint that the proposer can make. The Board reserves the right to request additional data, oral discussion, or presentation in support of written proposals at a pre-contract meeting.

E. Conditions of this RFP

The cost of developing proposals in response to this RFP is entirely the responsibility of the Proposer and shall not be chargeable to CWI or Board under any circumstances. CWI reserves the right to accept or reject any or all proposals submitted, to negotiate with all qualified bidders, or to cancel in part, or in its entirety, this RFP. Issuance of this RFP does not commit an award to contract, to pay any costs incurred in advance of the execution of a contract, or to procure or contract for goods and/or services.

The following conditions are applicable to all proposals. CWI reserves the right to:

- Negotiate any and all proposed costs, staffing levels, and all other specifics.
- Fund a lower-ranked proposal over a higher ranked proposal because of valid policy considerations.
- Conduct a pre-award review that may include, but is not limited to, a review of the proposer's record keeping procedures, management systems, accounting and administrative systems, training facilities, and training materials.
- Change specifications and modify contracts as necessary to facilitate compliance with the legislation, regulations, and policy directives; and to manage funding.
- End contract negotiations if acceptable progress, as determined by Board and staff, is not being made within a reasonable time frame.

PART II: Scope of Work and Specifications

A. Scope of Work

CWI is seeking an entity that provide consulting and training to our Business Services Team members and related staff, approximately 15 – 20 individuals.

- Review, analyze, and recommend changes to policies, guidance, and procedures for Business Services tools (OJT, IWT, Apprenticeship, etc.)
- Review and recommend changes to Business Services Team job descriptions, including desired skill sets and education/experience levels
- Recommend appropriate metrics to reach team and individual staff goals
- Train business services staff re: prospecting, discovery, relationship-building

Key topics for the training sessions include:

- Building Relationships with employers – prospecting, cold-calling and qualifying prospects
- Effective Communication – informational interviewing, listening and taking notes, holding business conversations and the art of small talk
- Needs Assessment – understanding the needs of the employer based on information gathered during initial meetings leading to the development of a plan of service
- Customer Service – developing proposals/menu of services for the employer
- Closing the Deal - asking for sale/commitment
- Meeting objectives and goals
- Time Management and Organization in the workplace

B. Project Specifications

Please provide a complete written response to this RFP which is double-spaced and does not exceed 10 single-sided pages. Proposals should include:

1. A Proposal Cover Sheet with:

- Proposer Name
- Mailing Address including city, state, and zip code
- Type of Organization or Independent Contractor
- Contact Personnel and person authorized to negotiate and sign (if different from contact personnel)
- Total amount of funds requested
- Sign cover page

2. A description of your organization including length of existence, vision, mission, and goals.
3. A description of your general approach to training on business and sales topics including methodology and philosophy as well as your relevant and recent (within the last five years) successes.
4. An example of a similar project created by your organization.
5. A clear explanation of how your entity will address the scope of work to be conducted with the Center of Workforce Innovations, Inc.
6. A list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion.
7. Credentials and qualifications of key personnel who will take responsibility for working directly on this project, including references not associated with CWI.
8. A detailed budget that breaks out expenses including proposed staff to be paid through the contract (CWI will only reimburse personnel costs for time actually worked), travel costs, and material/supplies. If proposing a flat rate for staffing please indicate if the rate includes all expenses. Please include a budget narrative for each proposed expense in terms of being necessary, allowable, and reasonable.

PART III. FINANCIAL REQUIREMENTS

A. Capabilities

Proposers must be able to demonstrate the administrative and financial capability to effectively and efficiently deliver the services proposed. Administrative capability includes the ability to design and implement the proposed services, conduct self-monitoring for contract compliance, achieve the contract objectives, provide quality service delivery, and keep appropriate, auditable records. Proposers must also meet fiscal reporting requirements in accordance with Generally Accepted Accounting Practices (GAAP), and show evidence of continued financial stability.

B. Cost and Price Analysis

All proposals will be evaluated on the basis of obtaining the most cost-effective price possible while achieving the highest quality service delivery. To accomplish this, CWI shall conduct a cost and price analysis on proposed costs during the proposal review process. Agencies are encouraged to submit their best offer for providing the services solicited and to thoroughly describe and justify the costs.

The cost and price analysis shall be conducted to ensure that the proposed costs are necessary, fair, and reasonable; to determine if the proposed costs are allowable and allocable; to determine if there is a duplication of costs with other programs; to ensure that the costs are directly associated with carrying out only the proposed services; and to ensure that the proposed costs will benefit the program.

C. Contract and Payment Method

Contracts are negotiated on a cost reimbursement basis.

Proposers are advised that any contract awarded under this IFB may be modified to incorporate legislative and policy changes, revisions to the program design, alterations of any services and activities provided or a reduction or increase in the amount of funding available.