

**INDIANA HOUSING AND COMMUNITY
DEVELOPMENT AUTHORITY**

INDIANA TRAINING INSTITUTE

FUNDED BY THE COMMUNITY SERVICES BLOCK GRANT

REQUEST FOR PROPOSALS

DUE: AUGUST 31, 2012 by 5:00 pm/est

Return all proposals to:

**Indiana Housing and Community Development Authority
Attn: CSBG ITI RFP
30 South Meridian Street
Suite 1000
Indianapolis, IN 46214**



Request for Proposals for Training Services

NOTICE OF FUNDING OPPORTUNITY

The Indiana Housing and Community Development Authority (IHCDA) is requesting proposal from one or more organizations to plan, coordinate, and deliver training services to Community Action Agencies that promote knowledge, service delivery, and innovation for staff, leadership development, and strengthen the overall capacity of said stakeholders to positively impact individuals, families, and communities.

ABOUT THE INDIANA HOUSING AND COMMUNITY DEVELOPMENT AUTHORITY

IHCDA was created in 1978 by the Indiana General Assembly and is a quasi-public financially self-sufficient statewide government agency. IHCDA's mission is for every Hoosier to have the opportunity to live in safe, affordable, good-quality housing in economically stable community. IHCDA believes that growing Indiana's economy starts at home.

IHCDA's programs are successful in large part because of the growing network of established partnerships with local, state, and federal governments, for-profit businesses, and not-for-profit organizations. IHCDA's for-profit partners include investment banks, mortgage lenders, commercial banks, corporate investment managers and syndicators, apartment developers, investors, homebuilders, and realtors. IHCDA's not-for-profit partners include community development corporations, community action agencies, and not-for-profit developers.

FUNDING SUMMARY

IHCDA receives \$9.8 million in Community Services Block Grant (CSBG) funds from the U.S. Department of Health and Human Services. These funds are allocated to the state's 23 community action agencies (referred to as the Network) to eliminate the causes of poverty in Indiana by providing employment, education, child care, health care support and assistance, and leveraging relationships within the communities they serve.

IHCDA will provide a professional services contract up to \$400,000 over a two-year period, or up to \$200,000 per year, to conduct training to the Network. The contract period will run from January 1, 2013 to December 31, 2014. As with all funds provided through CSBG, funding is provided on a reimbursement basis.

SCOPE OF WORK

In this proposal, respondents are expected to demonstrate the capacity to assess training needs, develop a training plan, deliver training, and evaluate training so that the Network gains understanding, increases knowledge, and changes behavior. Each section of the proposal- assessment, plan, delivery, and evaluation – is expanded upon below. Proposals must include responses to each section.

Section 1 – Needs Assessment

Because training is expected to be developed with input from the Network, the assessment process is critical to developing and evaluating effective training. Therefore, respondents are expected to develop a needs assessment tool and to compile and analyze training needs annually.

In this section, the respondent must demonstrate an advanced understanding of the overall assessment process, knowledge of current training needs, and identify how a training plan will be crafted based on identified training needs.

Section 2 – Training Plan

Proposal respondents are expected to plan, implement, and evaluate a multi-year comprehensive training program, based on the assessment findings.

The training plan should include the proposed date (at least month and year), number of expected participants, desired outcomes of the training, location of the training, and number of days that the training will be held. Please note that a half day of training is 3.5 hours and a whole day of training is 7.0 hours. Respondents should identify whether trainers will be provided by the organization's staff, staff from the Network, or contractors.

The training plan should include a description of each of the training areas listed.

- 1) **Leadership** enhances the competence of current senior leadership as well as promotes the development of future leaders. The respondent should demonstrate how the organization has provided training on this topic in the past. Respondents may consider including some of the following topics in their training plans: supervision and management, fiscal responsibilities, monitoring and compliance, program design and delivery, building relationships with community stakeholders, program evaluation, and other relevant topics necessary to lead community action programs and staff.
- 2) **Organizational Capacity** is intended to improve the efficiency of operations and the quality of program performance. The respondent should demonstrate how the organization has provided training on this topic in the past. Respondents may consider including some of the following topics in their training plans: planning and program design, fiscal responsibilities, grant management, procurement and contracting, performance and evaluation, monitoring and compliance, Information Technology, Management Information Systems, legislative and regulatory interpretation and compliance, Board training and development, fund development, and other areas applicable to the Network.
- 3) **Professional Certification Programs** provide Network staff with opportunities to participate in regional or national certification programs. The respondent should demonstrate how the organization has provided training on this topic in the past. Respondents may consider including some of the following topics in their training plans: Results Oriented Management and Accountability, Train the Trainer Programs, Certified Community Action Professional, and National Community Action Partnership's Standards of Excellence.
- 4) **Diversifying Revenue, Fund Development, and Fund Research** is intended to provide Network participants with sessions that focus on generating private sources of revenue to support their operational and community-based needs that are outside of the parameters of public and

federal funding. The respondent should demonstrate how the organization has provided training on this topic in the past. Respondents may consider including some of the following topics in their training plans: diversifying revenue, creating a fund development plan, conducting fund research, and donor cultivation and relationship building.

- 5) **Financial Reporting and Nonprofit Finance** is designed to increase the agencies' efficiency and accuracy in budgeting, financial reporting, closeouts, and grants management. The respondent should demonstrate how the organization has provided training on this topic in the past. Respondents may consider including some of the following topics in their training plans: financial management for nonprofits, cost allocation, grants management, Office of Management and Budget circulars, and procurement and contracting.

Section 3- Delivery

The proposal should include how the organization plans to market the trainings, coordinate registration, and track attendance. To conduct training under this contract, once a designated training plan has been decided upon, registration for a class must equal at least 75 percent of the expected attendance listed in the training plan.

The training plan should include a description of each of the training areas listed.

- 1) **Marketing and Promotion-** The respondent should describe how training will be promoted to participants.
- 2) **Registration-**The respondent should describe the registration process. The description should include who will coordinate the registration process, how technology will be used, and how long the registration period will be open for each training. The description should also include a process for late registrations and cancellations.
- 3) **Attendance-** The respondent should describe how the organization will handle late arrivals, early departures for certification programs, and participants that fail to show for training.
- 4) **Cancellation-** The respondent should provide a narrative about how training cancellations and postponements will be handled.

Section 4 – Evaluation

The proposal should incorporate evaluation and feedback mechanisms to ensure that the training efforts are on target. The respondent should describe the evaluation plan from the perspective of the participant, the instructor, and the organization. In the plan, the respondent should consider evaluating the training results. The proposal should include a narrative of how the evaluation results will be incorporated in to the program design.

ORGANIZATIONAL CAPACITY

This section is designed to evaluate the respondent's capacity to complete the project successfully and in compliance with federal requirements.

In addition to the proposal narrative, each respondent should include:

- 1) **Project Budget-** A two-year budget for all costs associated with this project, beginning January 1, 2013 to December 31, 2014. The budget should include a cost per training. The cost per training should include all administrative expenses, such as travel expenses, fees for contracting with third party trainers, supplies and materials. Training days are 7.0 hours.
- 2) **Summary of Organizational Qualifications-** Please include a brief summary of organizational experience and expertise in training with the Community Action Agencies or other nonprofit organizations. Also include the items listed below:
 - a. A copy of your business' State of Indiana Certificate of Existence from the Secretary of State.
 - b. Copies of pertinent organizational certifications, designations, licensures.
 - c. Minority-owned Business Enterprise/Women-owned Business Enterprise (MBE/WBE) designations, if any (no more than 5 pages).
 - d. Location of the trainings
 - e. Incorporation of technology into assessment, training, delivery, and evaluation
- 3) **Summary of Current Projects-** A brief description of each of the most recent projects to support organizational qualifications (no more than 2 pages).
- 4) **Principal Staff-** A summary of the qualifications of each of the organization's executive management team (no more than 4 pages).
- 5) **Designated Project Staff-** Names, titles, responsibilities, and resumes of staff responsible to complete this project. Identify the primary point of contact for this proposal (no more than 3 pages).
- 6) **References-** Provide two letters of reference that can demonstrate the respondent's capacity to manage this contract and provide training.

SUBMISSION INFORMATION

PROPOSAL DUE DATE

Proposals must be received by IHCDA no later than 5:00 pm/EST on Friday, August 31, 2012, Eastern Standard Time, at the address listed below. Proposals may be mailed, shipped via Fed Ex, UPS, or other standard carrier, or hand-delivered. Late proposals may be accepted at IHCDA's discretion.

Indiana Housing and Community Development Authority
Attn: Energy Programs-CSBG ITI RFP
30 South Meridian Street, Suite 1000
Indianapolis, IN 46204

Applicants may be invited to meet with IHCDA representatives to discuss proposed activities prior to the contract award. Incomplete proposals or proposals that do not follow the submission guidelines will not be considered for service provision.

TENTATIVE REVIEW TIMELINE

August 31, 2012	Proposals are due
September 3-7, 2012	Proposals are reviewed
September 10-12, 2012	Questions sent to Respondents
September 13, 2012	Review Team meetings for Final Review
September 27, 2012	Board Reviews Recommendations
September 28, 2012	Respondents Notified of Funding Decision

SUBMISSION FORMAT

Respondents must provide one (1) hard copy proposal and supporting materials and one (1) electronic copy of the proposal and supporting materials. The electronic copy can be saved on a disc or flash drive only. IHCDA will time and date stamp proposals to evidence timely receipt.

SUBMISSION MATERIALS

Respondents may submit supporting materials, such as an annual report, most recent financial documents demonstrating annual revenue and expenses, examples of assessment tools, training plans developed for other clients, evaluation tools, and workshop documents.

ELIGIBLE ENTITIES

Eligible applicants include for-profit and not-for-profit corporations in good standing with IHCDA, the state of Indiana, and the federal government.

TECHNICAL ASSISTANCE

IHCDA staff will be available for questions related to this RFP. An RFP technical assistance session will be held on Monday, August 20 from 10 am to 11am at IHCDA offices, during which time questions will be entertained. The questions and answers will be posted online at www.ihcda.in.gov.

PROPOSAL EVALUATION PROCESS

Evaluation of all proposals will be done by IHCDA and its counsel. Based on the evaluation criteria, a short list of the highest ranked proposals may be selected and notified, and separate negotiations will then be conducted with each selected entity to discuss its proposal. At the conclusion of these negotiations, IHCDA will establish a deadline for final offers from each of the selected firms. Final selection will be at the discretion of IHCDA. IHCDA will not return proposals to bidders or publish proposal scoring.

PROPOSAL EVALUATION CRITERIA

The following criteria will be IHCDA's primary considerations in the selection of the respondent(s):

1. RELEVANCE AND EXPERIENCE– Quality and experience of firm
2. ADMINISTRATIVE CAPACITY – Operational systems and procedures and capacity
3. PLAN CONTENT – The alignment of the plan with the proposal requirements

4. COST – The budget and individual line items will be reviewed and considered individually and wholly
5. MBE/WBE DESIGNATION – The designation of Minority- and /or Women- Owned Business Enterprise will be considered
6. INDIANA BUSINESS – The entity must be incorporated and conduct business in the State of Indiana

TERMS and CONDITIONS

This request for proposals (RFP) is subject to the following terms and conditions:

1. This RFP is a request for the submission of proposals, but is not itself an offer and shall under no circumstances be construed as an offer.
2. IHCDCA expressly reserves the right to modify or withdraw this RFP at any time, whether before or after any proposals have been submitted or received.
3. IHCDCA may reject any or all submissions submitted in response to this RFP at any time prior to entering into a written agreement.
4. In the event the party selected does not enter into the required agreement to carry out the purposes described in this RFP, IHCDCA may, in addition to any other rights and remedies available at law or in equity, withdraw the selection and commence negotiations with another party.
5. In no event shall any obligation of any kind be enforceable against IHCDCA unless and until a written agreement is entered into.
6. Each respondent agrees to bear all costs and expenses of its response and there shall be no reimbursement for any costs and expenses relating to the preparation of responses of proposals submitted hereunder or for any costs or expenses incurred during negotiations.
7. By submitting a response to this RFP, each respondent waives all rights to protest or seek any remedies whatsoever regarding any aspect of this request, the selection of a respondent or respondents with whom to negotiate, the rejection of any or all offers to negotiate, or a decision to terminate negotiations.
8. IHCDCA reserves the right to reject any or all firms, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed to be in its best interest.
9. IHCDCA reserves the right not to award a contract pursuant to this RFP.
10. All items become the property of IHCDCA upon submission.