



## **Invitation for Bids (IFB)**

**for**

## **Facilitation and Strategic Planning**

**Release Date: August 31, 2020**

**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 also directly delivers services such as career advising, provides credit recovery programming, and has community learning centers for adult education services. Finally, CWI provides programmatic and fiscal oversight for sub-recipients of adult education providers and youth oriented workforce providers, and for the American Job Centers, known as WorkOne in Indiana.

CWI is issuing this Invitation for Bid (IFB) to solicit interest by experienced entities to provide facilitation and strategic planning assistance to the Core Leadership and Board of CWI.

### **B. Questions**

Questions relating to this IFB may be submitted prior to deadline of **September 11, 2020**. Questions must be in writing and directed to Tamara Stump, [tstump@cwicorp.com](mailto: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](mailto:tstump@cwicorp.com) with an **incoming timestamp of 2:00 pm CST, September 28, 2020**. 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 IFB 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 IFB 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 IFB**

The cost of developing proposals in response to this IFB 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 IFB. Issuance of this IFB 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 will work with the Center of Workforce Innovations, Inc. Core Leadership and Board to review the various integrated plans within the multiple departments of CWI and outside stakeholder commitments in order to achieve the necessary goals and outcomes. This project has two components. The first would begin October 1, 2020 and last approximately eight weeks and include review of plans, facilitation of discussion, and writing of strategic plan. The second component is a follow up with Core Leadership once the plan has been implemented. Follow up would occur three months after implementation. Specific outcomes include:

1. Review of all plans from among the various departments of CWI
  - Review all plans in preparation to facilitate discussion with Core Leadership and Board
2. Convene Core Leadership and Board and Facilitate Discussion
  - Facilitate discussion of plans and commitments among the various departments of CWI
  - Facilitate discussion of outcomes and accomplishments of plans
  - Facilitate discussion on how to integrate the various plans and manage outcomes
3. Review Mission and Vision of Center of Workforce Innovations
  - Review mission and vision to ensure alignment with plans, commitments, goals, and outcomes
4. Draft and finalize Strategic Plan
  - Draft plan based on outcomes of discussion and review of mission and vision
  - Develop final strategic plan after review by Core Leadership
5. Follow Up Session
  - Conduct Follow Up Session 3 months after implementation of strategic plan to review progress of plan with Core Leadership

## **B. Project Specifications**

Please provide a complete written response to this IFB which is double-spaced and does not exceed 15 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 in blue ink.
2. A description of your organization including length of existence, vision, mission, and goals.
3. A description of your general approach to strategic planning and consultation, including methodology and philosophy as well as your relevant and recent (within the last five years) successes.
4. An example of a finished strategic plan created by your organization.
5. A clear explanation of how your entity will address the scope of work to be conducted with the Core Leadership and Board of 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. Please include check in points to provide update to CWI President and CEO.
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.