

Workforce Development Board of Central Ohio

Request for Proposals for The Future of Smart Work

December 14, 2018

**Response Due Date and Time:
Friday, January 25, 2019
2:00 PM EST**

**Submit Electronic Proposal Package to:
rfp-proposal@wdbco.org**

PROPOSAL SIGNATURE FORM

This page, signed by an officer of the offering firm or a designated agent empowered to bind that entity in a contract with the Workforce Development Board of Central Ohio (WDBCO), should accompany each proposal submitted for consideration.

I, the undersigned, having carefully examined the Request for Proposals (RFP), propose to furnish services in accordance therewith as set forth in the attached proposal.

I hereby certify that, to the best of my knowledge, this submission is complete and all statements made therein are true and accurate.

I also affirm I am duly authorized to sign and submit this response on behalf of the Offeror named below.

I further acknowledge that by signing this form I am representing that, in the event this proposal is accepted, the Offeror is willing and able to execute a contract in the form shown in the RFP, with the understanding that the scope and compensation provisions will be negotiated and included in the final contract.

By my signature below, I attest that I have read, understand and agree to the terms, conditions and requirements set forth in the RFP, including, but not limited to: WDBCO's standard contract terms and conditions and any special terms and conditions incorporated in the solicitation documents.

Failure to sign and return this form may result in the rejection of the accompanying proposal.

OFFEROR INFORMATION:

OFFEROR (Company Name): _____

ADDRESS: _____

CITY, STATE, ZIP: _____

PHONE: _____ EMAIL: _____

AUTHORIZATION TO PROPOSE:

Signature (Manually signed in ink)

Date

Printed Name

Title

TERMS AND CONDITIONS FOR CONSULTANTS INFORMATION FOR CONSULTANTS

SUBMISSION OF PROPOSAL

Proposals must be submitted according to this proposal form.

ACCEPTANCE AND REJECTION

This proposal submitted by the consultant to the WDBCO will be accepted or rejected within a period of 180 days from proposal due date. The WDBCO reserves the right to waive technicalities, and to request new proposals (rebid) on the required material. Each invitation for Bids, Request for Statements of Qualifications, and Request for Proposals issued by the WDBCO shall state that the Bid or Request may be cancelled and that any bid or proposal may be rejected in whole or in part when it is for good cause and in the best interests of the City.

WITHDRAWAL OF PROPOSALS

Consultants may withdraw their proposals at any time prior to the time specified in the advertisement as the closing time for the receipt of proposals. However, no consultant shall withdraw or cancel his/her proposal for a period of 180 calendar days after said advertised closing time for the receipt of proposals.

CONTRACT

The consultant to whom an award is made will be required to execute a written contract with the WDBCO within seven days after receiving such contract for execution.

LIABILITY, INSURANCE, LICENSES AND PERMITS

Where consultants are required to enter or go onto WDBCO property to deliver materials or perform work or services as a result of bid award, the Consultant will assume full duty, obligation and expense of obtaining all necessary licenses, permits, and insurance when required. The Consultant shall be liable for any damages or loss to the WDBCO occasioned by negligence of the Consultant (or his/her agent) or any person the Consultant has designated in the completion of this contract as a result of this bid. Particular attention is directed to the statutory requirements of the State of Ohio relative to the licensing of corporation organized under the Laws of any other State.

TAXES

Federal and/or State Taxes are not to be included in prices quoted. The successful consultant will be furnished an exemption certificate if needed.

CHANGES AND ADDENDA TO PROPOSAL DOCUMENTS

Questions as to the interpretation of the Request for Proposal shall be submitted in writing to the WDBCO at rfp-proposal@wdbco.org. In order to receive consideration, questions must be received by the question cut-off date as indicated in this RFP. Any

interpretations of questions so raised, which in the opinion of the WDBCO or its representative require interpretations, will be issued by addenda posted on the WDBCO web site. The WDBCO or its representative will not be bound by any oral interpretations which are not reduced to writing and included in the addenda.

IN THE EVENT OF A CONTRACT

An agreement which may result from this proposal shall not be modified or altered by any subsequent course of performance between parties or by additional terms contained in any subsequent documents unless said additional or differing terms are incorporated by contract modification authorized to be entered into by ordinance.

REMEDIES

All claims, counterclaims, disputes and other matters in question between the WDBCO, its agents and employees, and the Consultant arising out of or relating to this agreement or its breach will be decided in a court of competent jurisdiction within the County of Franklin, State of Ohio.

CONTRACT COMPLIANCE

The WDBCO encourages the participation of City of Columbus certified minority and female business enterprises. *While the participation and or partnering of Columbus certified minority and female owned businesses is encouraged the level of minority and female participation will not be a condition of the bid award.

All consultants shall identify all subconsultant(s) who will perform any type of contracting on WDBCO proposal(s). All consultants shall include in their proposal response the anticipated scope of work and percentage of work that will be performed by all Sub-Consultant(s), along with their contract compliance number(s).

All consultants, including subconsultants, who are party to a contract as defined in Columbus Code 3901.01, must hold valid contract compliance certification numbers.

This information is gathered and monitored by the city of Columbus Office of Diversity and Inclusion. Please contact ODI for assistance with identifying potential minority consultants. Go to Vendor Services to verify that vendors have an active contract compliance number.

<http://vendorservices.columbus.gov/>

Office of Diversity and Inclusion
1393 E. Broad Street, 2nd Floor
Columbus, Ohio 43205
(614) 645-4764
M/FBE Certification/
Contract Compliance
Tia Roseboro

614-645-2203

ADDITIONAL CONTRACT TERMS AND REQUIRED DOCUMENTS IN THE EVENT OF A CONTRACT

This section sets forth contract terms and the required contract documents that the successful offeror must execute following the award of the contract by the contracting authority.

SAVE HARMLESS

The Consultant shall protect, indemnify and save the WDBCO harmless from and against any damage, cost, or liability, including reasonable attorneys' fees resulting from claim, by third parties for any or all injuries to persons or damage to property arising from the intentional, willful, or negligent acts or omissions of the Consultant, its officers, employees, agents, or Subconsultants in providing goods or services under the terms and conditions of this contract.

SAVE HARMLESS DISCLOSURE OF PROPRIETARY INFORMATION

The Consultant agrees to indemnify and hold harmless the WDBCO, and their respective officials, employees and other agents and representatives, against loss, claim, liability in tort or by statute imposed, charge, cost or expense, including without limitation, attorneys' fees to the extent permitted; by law, which may be incurred in connection with, or in any manner of any damage or loss arising from disclosure of proprietary information.

CONFIDENTIAL INFORMATION

The Chief Executive Officer of the WDBCO requesting proposals may choose to keep RFP information in confidence during the evaluation process and until the time a contract is executed. This information may include all proposal documentation, notes, including detailed prices, references, resumes, technical and cost information, etc. Thereafter, proposals and all submissions will become public information,

CONSULTANT'S PROPRIETARY INFORMATION

The WDBCO agrees to keep any information confidential except as otherwise required to be disclosed by law including but not limited to the contract.

INDEPENDENT CONSULTANT STATUS

The Consultant shall perform its duties as an independent consultant and not as an employee. Neither the consultant nor any agent or employee of the consultant shall be or shall be deemed to be an agent or employee of the WDBCO. The Consultant shall pay when due all required employment taxes and income tax on any monies paid pursuant to the contract. The Consultant shall acknowledge that the Consultant and its employees are not entitled to unemployment insurance benefits unless the Consultant or a third party provides such coverage and that the WDBCO does not apply for or otherwise provide such coverage. The Consultant shall have no authorization, express or implied, to bind the WDBCO to any agreements, liability, or understanding except

as expressly set forth in the contract. The Consultant shall provide and keep in force worker's compensation (and show proof of such insurance) and unemployment compensation insurance in the amounts required by law, and shall be solely responsible for the acts of the Consultant, its employees and agents.

PROTECTION OF WDBCO'S CONFIDENTIAL INFORMATION

The Consultant shall acknowledge that some of the material and information which may come into its possession or knowledge in connection with the contract or its performance, may consist of confidential information, the disclosure of which to, or use by, third parties could be damaging. Therefore, access to information concerning individual recipients of the WDBCO's services to individual clients, among other items, shall not be granted except as authorized by law or agency rule. The Consultant shall agree to hold all such information in strictest confidence, not to make use thereof for other than the performance of the contract, to release it only to authorized employees or subconsultants requiring such information, and not to release or disclose it to any other party. The Consultant shall agree to release such information or material only to subconsultants who have signed a written agreement expressly prohibiting disclosure. The Consultant shall further agree to either destroy or return all such information at the end of the term of the contract.

This section does not impose any obligation on the Consultant if the information is: (1) publicly known at the time of disclosure; (2) already known to the receiving party at the time it is furnished to the consultant; (3) furnished by the WDBCO to others without restrictions on its use or disclosure; or (4) independently developed by the receiving party without use of the proprietary information.

REQUEST FOR PROPOSAL

1. Project Information:

1.1 Project Name: The Future of Smart Work

1.2 Background:

The Workforce Development Board of Central Ohio (WDBCO) is a nonprofit organization serving as the Strategy and Policy Board for Ohio Workforce Area 11, Columbus and Franklin County. The Board assists in-demand sector employers with developing a talent pipeline and jobseekers with acquiring the skills and credentials for in-demand careers. WDBCO has a 27 member board of professionals in the private, public, and non-profit sectors. Board members are appointed by the Mayor of Columbus and the Franklin County Board of Commissioners and are charged with ensuring programs and initiatives are aligned with the overall workforce development plan on the local, state and national level.

As the Winner of the U.S. Department of Transportation first ever Smart City Challenge, **The City of Columbus** was awarded funding and the designation as America's Smart City. Smart Columbus embraces the reinvention of transportation to accelerate human progress.

The Smart Columbus Initiative will bring several electrification, decarbonization, mobility and data projects to the region for the next three years. The initiative has as a goal to create *ladders of opportunity* for residents. What is missing from the *ladders of opportunity* goal is the actual job creation that will occur from the implementation of the Smart Columbus projects. WDBCO and Smart Columbus seek to work with thought leaders and future focused experts who will form a Steering Committee to help guide the successful vendor's work. The successful vendor will examine what the future jobs and careers will be and establish clear *ladders of opportunity* by cross walking education, credentialing and experience to specific careers. The project will look at:

- **Advancements in technology and innovation** - decarbonization, grid modernization, green power, connected and autonomous vehicles, electric vehicles, digital tools, robotics and AI, cloud-based analytics, as well as impacts in other industries impacted by technologies and innovation such as healthcare and financial services
- **Workforce design** – supply versus demand; skills needed now and in the future; traditional versus mobile workforce; generational implications for training and education

WDBCO's desired end state is to assess its readiness for future work demands and ensure the Central Ohio workforce is prepared to meet the demands identified.

2. Scope of Services:

This process will consist of three phases. This information is to be identified through:

- Research
- Benchmarking leading workforce practice front-runners in the US and abroad including those that focus on decarbonization, electrifying the transportation sector, intelligent transportation systems, connected and autonomous vehicles, the internet of things as well as industries impacted by technologies and innovation such as healthcare and financial services
- Interactions (through surveys, interviews, focus groups, visioning, etc.) with business partners and thought leaders
- Performing analysis of Central Ohio's current workforce and making recommendations to create the Future Workforce

Phase 1 – Identification of what the impacts of technological advancements will have on the Central Ohio Workforce.

In this phase, we seek to identify technological changes that will have a significant impact, both disruption and creation, on the future employment landscape. Specifically, WDBCO is interested in gaining an understanding of what training and education will need to look like to meet the demands that the future jobs will require in the fields of decarbonization, grid modernization, connected and autonomous vehicles, intelligent transportation, the internet of things and programming as well as industries impacted by technologies and innovation such as healthcare and financial services.

Key Deliverables:

- A summary analysis and report will be provided to WDBCO identifying the most significant disruptors that will drive change within the employment landscape of Central Ohio. The report should include:
 - Observations/recommendations about actions WDBCO should contemplate taking based on the disruptions and creation of jobs; and,
 - An assessment for 3-5 years from now, and 10 years into the future.
 - All data gathered, research performed, interviews documented, etc., which supports the report and recommendations/conclusions should be provided in an organized manner.
- A catalogue of emerging career paths related to jobs of the future.
- The report should also include future technology changes in broad categories that already are part of the Central Ohio economy: Information Technology, Intelligent Transportation Systems; equipment; infrastructure; as well as newer technologies that may become more integrated into work activities such as voice command, artificial intelligence, robotics, virtual reality.

Phase 2 – Gap Analysis

With information from Phase 1, WDBCO seeks to understand and plan for the identified impacts.

Specifically, WDBCO and the workforce system will be positioned to respond to the following:

- What are the capabilities required to deliver service?
- Who might provide the training and credentials identified and how capable are they today?
- What gaps exist and how do we close those gaps?

Key Deliverables:

- Gap analysis of current and future work to be performed, skills availability and where skill gaps are identified, options to address
- Provide supporting documentation and report
- Other deliverables, if identified

Phase 3 – Detailed Cross-Walk

With the information from Phase 2, perform an analysis of current occupation classifications to future job categories and specific training needed to develop knowledge, skills, abilities (KSAs) for future workforce.

Key Deliverables:

- Identification of job categories and KSAs
- Identification of pertinent training (new positions or positions significantly changed) based on future workforce
- Report, and other deliverables, if identified.
- Vendor proposals are being sought for Phases 1, 2, and 3.
- Vendor will be asked to provide interim briefings at key milestones to a Steering Committee established by WDBCO.
- Proposals should include a suggested approach (methodology) and specific deliverables, a timeline for each phase, maximum hours needed for each phase, company qualifications that demonstrate the ability to successfully delivery the results desired, the proposed study team and qualifications, and examples of comparable work studies successfully completed for other entities.

3. **Consultant/Personnel Prequalifications:** None

4. **Project Schedule:**

RFP Due:	January 25, 2019
Interviews / Short List (if needed):	First 2 weeks of February 2019
Consultant Selected:	February 18, 2019

Phase 1 – 6 weeks, final report	April 1, 2019
Phase 2 – 6 weeks, final report	May 13, 2019
Phase 3 – Schedule TBD based on Phases 1-2	

5. **RFP Pre-Proposal Webinar :** Wednesday, January 9, 2019 at 2:00PM EST. Access information will be posted on WDBCO's website (www.wdbco.org) on Monday, January 7, 2019.

6. **Proposal Submittal Instructions:**

6.1 Proposals shall be submitted as a PDF document online via rfp-proposal@wdbco.org until **2:00 PM Eastern Time on January 25, 2019 with subject line The Future of Smart Work RFP**. Proposals received after this date and time will be rejected.

6.2 Submittal Instructions

6.2.1 Proposals shall be submitted as a PDF document. Proposals must be submitted and finalized prior to the Closing Time of **2:00 PM EST on January 25, 2019**. The WDBCO strongly encourages Offerors to allow sufficient time and at least one (1) day before the Closing Time to finalize their submissions.

6.2.2 Important Notes Regarding Submissions

6.2.2.1 Proposals will only be visible and accessible to the evaluators after the Closing Time.

6.2.2.2 It is the responsibility of the Offeror to make sure WDBCO received the submission.

6.2.2.3 Offerors will receive an email confirmation once they finalize their submissions. The date/time stamp on the submission email constitutes the official date/time of receipt. Offerors are solely responsible for ensuring their proposals have been successfully received before the Closing Time specified in the RFP.

6.3 Questions

Direct questions concerning the RFP contents via e-mail only to:
rfp-proposal@wdbco.org

The subject line should state “**Future of Smart Work: Questions**”.

No contact is to be made with the WDBCO other than through e-mail with respect to proposals or the status thereof. The deadline for questions is **5:00 PM EST, January 11, 2019**. Answers to all questions received will be posted on the WDBCO website (www.wdbco.org). Offerors are encouraged to check the website frequently.

6.4 Evaluation

Proposals will be evaluated based on the enclosed selection criteria. Requests to view a proposal will be arranged upon receipt by the WDBCO of a written request for such; therefore, any proposal may be subject to viewing by the public. If any information contained in the documents submitted is deemed proprietary in nature, the offeror is required to defend the WDBCO concerning any litigation arising from the Offeror's request for confidentiality.

6.5 Proposal Format (only the following format will be accepted)

6.5.1 Proposals may not exceed thirty (30) letter-size (8.5” x 11”) pages and shall include the information specified in Section 6.6.3.

6.5.2 Complete the required Proposal Signature and Byrd Anti-Lobbying Amendment Compliance and Certification forms. These documents shall be signed by a person authorized to obligate the offeror's firm and included as the first two pages of the Offeror's proposal. These forms do not count towards the 30-page limit described in Section 6.5.1.

6.5.3 Page numbers must be centered at the bottom of each page.

6.5.4 Font must be 11 pt., Times New Roman or Arial.

6.5.5 Cover letters are not required. If submitted, **a cover letter will count against** the 30-page limit of the proposal.

6.6 Proposal Content

6.6.1 Offerors shall limit the proposal to no more than thirty (30) total pages of information (e.g. text, graphics, etc.). A 'page' is one side of a sheet of paper with text, graphics, etc. If only one side of a sheet of paper has text, graphics,

etc., then that is one page. If both sides of a sheet of paper have text or graphics, that will be counted as two pages. The proposal shall include the Proposal Signature and Byrd Anti-Lobbying Amendment and Certifications forms, which are not counted in the 30-page limit. No cover letter, appendices or additional information is acceptable. **Proposals exceeding the 30-page limit will be rejected.**

6.6.2 Provide information requested below in the order outlined or the proposal may be rejected.

6.6.3 Proposals must address each of the following subjects in the order specified below, using the headings provided. These elements correspond to the evaluation criteria noted in Section 7. Note that page breaks **are not** required between sections; however, section tab dividers will not be counted against the page total unless they contain text other than that necessary to identify the section. **Failure to provide the information requested may result in the proposal being rejected.**

Section A. Key Roles
Address topics discussed in Section 7.1.

Section B. Bench Strength
Address topics discussed in Section 7.2.

Section C. Past Performance
Address topics discussed in Section 7.3.

Section D. Understanding of the Project and Approach
Address topics discussed in Section 7.4.

Section E. Location of Solution Provider and Resources
Provide the firm location (street address) and the name, phone number, and e-mail address for the contact person for the proposal. Address topics discussed in Section 7.5.

Section F. Pricing
Provide base and billable hourly rates for each role proposed. Address topics discussed in Section 7.6.

7. Evaluation Criteria:

Each proposal will be evaluated using the same criteria as identified below. The maximum value that can be assigned to a proposal is 150 points. The criteria and associated point values are outlined below.

7.1 Key Roles (Maximum Value: 60 Points)

Present the education, training, experience, overall qualifications, and availability for each of the key roles identified in Section B of the RFP.

7.1.1 Project Manager (Maximum Value: 20 Points)

Points will be awarded based on the education, experience, and availability of the proposed candidates for the Project Manager position. The ideal candidate will be someone who is local, has years of experience working in a Project Management capacity. Furthermore, candidates should have strong

communication skills and experience working in research and policy development. .

7.1.1.1 Relevant Experience (Maximum Value: 15 Points): experience relevant to the described services; the candidate's project experience should be adequately described to enable evaluators to discern his/her level of experience.

7.1.1.2 Overall Experience (Maximum Value: 5 Points): the candidate should have demonstrated experience leading a project team and managing a project to successful conclusion. The candidate should possess experience in facilitation of meetings and communicating with stakeholders.

7.2 Bench Strength (Maximum Value: 20 Points)

The responding firm will convey the depth of its team and its ability to provide the personnel and resources necessary for the Project. The WDBCO encourages collaboration (sub-contracting model) between companies to increase team diversity (MBE/FBE/DBE) and strengthen the bench.

7.3 Past Performance (Maximum Value: 15 Points)

The responding firm will identify specific projects in its portfolio that best encapsulate the breadth of its capabilities, the depth of its bench and its ability to provide the personnel and resources. These featured projects must include a point of contact whom the WDBCO may call for a reference. Additionally, the responding firm must provide references whom can validate the skills and capabilities of candidates for the key roles. Resultant scores will be based on discussions with references.

7.4 Understanding of Project and Approach (Maximum Value: 40 points)

The responding firm should discuss its understanding of the project and its approach to carrying out and completing the project including key milestones.

7.5 Location of Solution Provider and Resources (Maximum Value: 10 points)

The WDBCO places high value on talent in the Central Ohio region and emphasizes use of a local talent pool on WDBCO projects as much as possible. Ratings are based on the location of the majority of the bench resources, all key resources, and the nearest brick and mortar office location serving WDBCO as follows:

7.5.1 Location is within Franklin County or contiguous counties (10 points)

7.5.3 Location is within the State of Ohio (5 points)

7.5.4 Location is outside the State of Ohio (3 point)

7.6 Pricing (Maximum Value: 5 Points)

Responding firm will provide the unburdened, or base, hourly rates (cost of employee per hour to the firm) as well as the hourly billable rates (for which WDBCO will be invoiced) for each role. This is a requirement for the key roles detailed in Appendix B. A higher point value will be assigned based on the competitiveness of the rates provided by the responding firm compared to other Offerors.

8. Selection Process:

The Consultant Selection Committee shall evaluate the Offerors strictly upon the submitted proposals, in person interviews with Offerors, and the interviews with the Offerors' clients. The Consultant Selection Committee is usually composed of a minimum of five voting members, i. Voting members include representatives from WDBCO Board and Staff, outside Steering Committee Members and the Smart Columbus Program Management Office.

Each proposal package received shall be evaluated, scored, and ranked according to the criteria described herein and the Consultant Selection Committee will make a recommendation to the WDBCO Board of Directors for final determination. Offerors may be interviewed as a part of the process. Once the selection process is completed, the selected Consultant will be contacted by WDBCO staff to participate in a meeting to discuss the final scope of services.

9. Attachments:

9.1 Appendix A: **Staffing Matrix Budget**

9.2 Appendix B: **Key Roles**