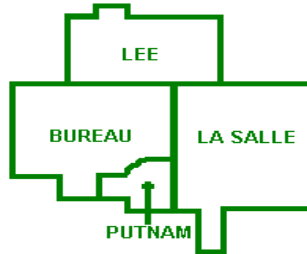


# Request for Proposal

Issued by:



***Business Employment Skills Team, Inc.***  
***3691 Cougar, unit B***  
***Peru, IL 61354***

On behalf of:

## ***North Central Illinois Works***

The Workforce Investment Board for  
Bureau, LaSalle, Lee and Putnam Counties

For:

NCI Works Board Retreat

**Date Issued:**

January 29, 2010

**Due Date:**

February 19, 2010

**Limitations:**

This RFP does not commit BEST, Inc. or NCI Works to award a contract, to pay any costs incurred in the preparation of a proposal to this request, or to procure or contract for services or supplies.

**Questions:**

Questions should be addressed only to Pam Furlan  
Business Employment Skills Team, Inc. at 815-224-7930.

**Evaluation and Review:**

Proposals will be evaluated according to the criteria attached in this packet and only in accordance with the written material submitted in the proposal.

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# I. General

## A. Background

*North Central Illinois Work's mission is to work hand-in-hand with business, service, government, education and non-profit organizations to enable workers to work and businesses to compete.*

Since its organization under the Workforce Investment Act of 1998 (WIA), North Central Illinois Works (NCI Works) has strived to address the workforce needs of Bureau, LaSalle, Lee and Putnam Counties. The mission statement of NCI Works reflects its desire to “enable workers to work and businesses to compete”.

## B. Intent and Purpose of the Request for Proposal (RFP)

WIA encourages a “strong role for local workforce investment boards and the private sector, with local business-led boards acting as ‘boards of directors’, focusing on strategic planning, policy-development and oversight of the local workforce investment system”. Furthermore, it states that “the local board shall promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, through the system, of connecting, brokering, and coaching activities, through intermediaries such as the one-stop operator in the local area or through other organizations, to assist such employers in meeting hiring needs”.

This RFP is intended to engage the services of an individual or firm to conduct a half-day Board Retreat that will provide the NCI Works membership, particularly its private sector members, with the knowledge and tools to carry out this intended role. By the end of the Retreat, NCI Works’ members should be able to assume a leadership role in advocating for and developing local resources to build a quality workforce and to enable businesses to compete in a global economy.

## C. Funding

A portion of BEST, Inc. WIA Admin funding will be used to accomplish the purpose of this RFP. BEST, Inc. and NCI Works reserve the right to negotiate the final cost of the winning proposal, or to reject all bids that are submitted in response to this RFP.

## D. Duration

The entire Project should be planned to begin on or shortly after April 1, 2010 and end on or before April 30, 2010. However, the time spent for the formal Retreat should be planned for no more than ½ day.

## **E. Inquiries**

Any inquiries should be addressed to Pam Furlan of Business Employment Skills Team, Inc. at (815) 224-7930.

## **F. Submittal/Proposal**

The bidder will submit seven (7) copies of the proposal, with one (1) original signature, to the following address:

NCI Works  
c/o Business Employment Skills Team, Inc.  
3691 Cougar Drive, Suite B  
Peru, IL 61354

Proposals must be received **by 3:00 p.m. on February 19, 2010**. Any proposal received after the deadline will not be reviewed. No fax or electronic submissions will be accepted.

## **II. Project Description**

Under WIA, local workforce boards are strongly encouraged to become more active and involved in policy-development and oversight of local workforce systems, and to assume a larger role interacting and collaborating with both the private and public sectors. NCI Works accepts these responsibilities entirely and wishes to enhance the stature of the Board in terms of leadership and influence on various issues relating to businesses and workforce development in our local communities. NCI Works believes it can best meet its obligations under the Act by focusing its efforts on convening the necessary forums; bringing the appropriate individuals, partners, and/or stakeholders to the table; and, identifying and addressing the issues and challenges facing employers, workers, job seekers and youth in its four-county area.

This project should be designed to provide Board members with ideas and strategies to carry out all of the roles identified above to the maximum extent possible. The bidder should take into consideration the size and make-up of the local workforce area and board when providing recommendations and/or sharing best practices from other areas. The Retreat should last no longer than one-half day, and the Presenter should come prepared to engage the audience in a direct dialog without using any break-out groups or brainstorming sessions. NCI Works members have indicated they want this retreat to be informational and instructional, and they want to leave with a set of strategies and ideas, appropriate for the NCI Works area, that will allow them to be key players with elected officials, business, labor, education, economic development and community-based organizations in our four-county area.

Project proposals will contain the following:

- 1. Well defined mission statement** to be part of the Executive Summary.

2. **A description of the bidder’s approach to the project and a detailed work plan for completing activities and producing deliverables identified in Section II “Project Description”.** This should include specific action steps and timetable for completion of entire project, i.e., Pre- and Post-Retreat activities, if applicable.
3. **A detailed description of the key personnel committed to this project,** including his/her/their background information, education, skills and past experience with like workforce boards.
4. **Detailed information on the bidder’s background and related experienced** with other workforce boards. Include one or two examples of similar projects with which the bidder worked, and identify tangible results accomplished as a result of the project. Included a minimum of three references who would be willing to discuss their degrees of satisfaction with the bidder’s previous work.
5. **A detailed budget** that supports the total project cost. The budget should include the following information:
  - **Personnel Costs;**
  - **Travel Costs;**
  - **Other Costs;**
  - **In-Kind Costs, if applicable;**
  - **Additional Costs for presentation to Board, if requested; and,**
  - **Payment Schedule – payments will be based on the completion of activities and acceptance of project deliverables.**

### III. Contract & Proposal Information

- A. Bidders are required to follow the guidelines contained in this document in preparing response proposals. Guidelines address both the structure and the content of the proposal. Proposals not adhering to the guidelines and/or instructions may not be reviewed or considered for selection.
- B. **All proposals submitted in response to this RFP will be subject to review by a committee comprised of NCI Works members and BEST, Inc. staff. Final approval for the project is the responsibility of NCI Works.**
- C. **This RFP does not commit BEST, Inc. to award a contract, to pay any costs incurred in the preparation of a proposal, or to procure or contract for services or supplies prior to issuance of a written contract document.**
- D. Bidders shall supply seven (7) copies of the proposal with one containing original signatures.
- E. Proposals submitted in response to the RFP and not selected for funding will not be returned.
- F. The final proposal, including any revisions made as a result of negotiations or modifications, submitted by the selected bidder (contractor) will become part of the contract with BEST, Inc.
- G. Proprietary rights to all data, materials, documentation, and products originated by and prepared for BEST, Inc. pursuant to the contract shall belong exclusively to BEST, Inc.
- H. The contractor will be prohibited from disseminating products and information developed under the contract without the prior written consent of BEST, Inc.
- I. BEST, Inc. will meet with the selected bidder prior to finalizing the contract. The purpose of the meeting will be to make sure both parties share the same understanding of the project goals, activities, outcomes, billing schedule and billing submittal procedures.
- J. The Executive Director of BEST, Inc. is authorized to accept, modify and approve or reject the services furnished by the contractor.
- K. The contractor shall provide oral and/or written progress reports to NCI Works during the contract period. Such reports will address the contractor's progress in completing project activities.
- L. Payment for services provided under the contract shall not be construed as evidence of the BEST, Inc. or NCI Works' acceptance of the project deliverables, as identified in Section II and described in Section IV. E. of this RFP. The contractor will provide copies of all

written deliverables in draft and final form to BEST, Inc. Should BEST, Inc. or NCI Works' reject any or all of the project deliverables, the Executive Director will notify the contractor in writing and cite the reasons for the rejection. The right to reject the report shall extend throughout the term of the contract and for ninety (90) days after the contractor submits the final billing for payment.

- M. The contract may be modified to include additional tasks reasonably related to the initial project with necessary funding to support completion of those additional tasks provided as appropriate. Requests for any modification to the original contract must be submitted in writing to the Executive Director of BEST, Inc. and to the Chair of NCI Works. In accordance with established policies concerning modifications, this request will either be approved by the Executive Director of BEST, Inc. or presented to NCI Works for review at its next regularly scheduled meeting. Final approval of modifications requiring formal action will be the authority of NCI Works.
- N. BEST, Inc. and/or North Central Illinois Works retains the right to accept or reject any or all proposals received. It also retains the right to negotiate with any qualified party, or to cancel in part or in its entirety this RFP process if that action would be determined to be in the best interests of North Central Illinois Works.
- O. The contractor may be asked to make a presentation to NCI Works at one of its regularly scheduled meetings. If requested by NCI Works, any additional costs in terms of time and travel incurred by the bidder will be reimbursed by BEST, Inc. on behalf of NCI Works. Bidder is obligated to attend the meeting and costs will be reimbursed according to applicable line items and amounts as identified in Section V. Budget Worksheets. The total cost for this expense should be included on the appropriate line item.

## **IV. Guidelines for the Preparation of the Proposal**

The proposal **must** be typewritten, on one side of standard sized (8-1/2" x 11") unruled paper. All proposals **must** be assembled according to the following outline:

- A. Cover Sheet
- B. Table of Contents
- C. Executive Summary (1- 2 pages)
- D. Information on Bidder
- E. Project Description
- F. Project Activities Schedule
- G. Cost Information
  - 1. Budget Worksheets
  - 2. Certification/Agreement Sheets

**Please read and follow the guidelines. Proposals that are not in compliance with the guidelines provided in this RFP may not be considered for funding. Specifications along with comments and suggestions that will appear in *italicized* print are presented on the following pages.**

Although BEST, Inc. reserves the right to negotiate the price and terms of any proposal, bidders should submit their proposals on the basis of their best offer since an award may be made solely on the initial submission.

**A. Cover Sheet**

- 1) Complete all items of information on the cover sheet.
- 2) Include the cover sheet as the first item in the proposal

*Comments and Suggestions: The cover sheet is the identification tag for the proposal. Be sure that all the information has been completed accurately.*

**B. Table of Contents**

- 1) Indicate all headings and subheadings with appropriate page numbers.
- 2) List all appendices by title and page number. For ease of the reviewer, appendices should be inserted at the end of the appropriate section rather than at the end of the entire proposal.

**C. Executive Summary**

Prepare a brief (1-2 pages) abstract that summarizes the **key** points regarding the completion of this project. Include the Proposer's Mission Statement.

*Comments and Suggestions: The summary is probably the first thing that will be read. It should be clear, concise and specific. It should identify the proposer and the projected cost for performing project activities and producing the project deliverables identified in Section II. It should also briefly describe the approach to be used for performing project activities.*

**D. Information on Bidder**

- 1) Provide an explanation of the bidder's experience and background which demonstrates that it has the necessary expertise to successfully carry out the objectives and achieve the goals of the proposed project. Indicate any experience or the extent to which the organization is familiar with a) local workforce boards, and b) strategies and/or models for carrying out the goals of the project.
- 2) Provide information as to the organization's size and structure as well as the length of time in business. If applicable, indicate if organization is a minority or female owned and operated business.
- 3) Provide brief resumes indicating qualifications of staff members to be assigned to perform services requested. Identify the individual to serve as project liaison.
- 4) Identify references who can be contacted regarding the organization's quality of work on similar projects and capabilities in general.
- 5) Provide a time line demonstrating the planning, implementation and completion of the project.

*Comments and Suggestions: This section primarily serves to provide assurances to North Central Illinois Work and BEST, Inc. that the selected bidder will provide quality services. Specifically, that personnel designated to complete the project and accomplish project deliverables possess the necessary qualifications and experience.*

**E. Project Description**

Prepare a narrative description of how the activities listed in **Section II Project Description** will be completed and deliverables will be achieved.

**F. Project Activities Schedule**

Proposer shall include a Project Activities schedule for each project component identifying the critical project activities, associated task(s), projected time-frames, staff responsible, and deliverables. The project activities and tasks that are identified on this form will be the basis for providing regular progress report.

The Projected Activities Schedule should reflect, complement and support the required activities in the **Section II Project Description**.

**G. Cost Information**

- 1) Using the forms in Section V. Budget Worksheets, develop a budget that supports the proposed cost for performing project activities and completing project deliverables. Include both the total hours and the hourly rate for each staff position under this project.
- 2) Provide a statement that recognizes invoices for payment will be submitted on a monthly basis.

**EVALUATION CRITERIA**

Evaluation of each proposal will be based on the following criteria:

- |  |                            |
|--|----------------------------|
| • Adherence to RFP guidelines                | Required for Consideration |
| • Project Content                            | 40 Points Maximum          |
| • Qualifications of the Project Staff        | 20 Points Maximum          |
| • Bidder’s Background and Related Experience | 20 Points Maximum          |
| • Cost Competitiveness                       | 20 Points Maximum          |

Each proposal will be independently evaluated by a committee of NCI Works’ Members and BEST, Inc. staff.

**NCI Work's Board Retreat  
Proposal Cover Sheet**

<b>Name of Individual/Firm</b>	
<b>Mailing Address</b>	
<b>City, State, Zip Code</b>	
<b>Telephone Number</b>	
<b>Fax Number</b>	
<b>E-Mail Address</b>	
<b>TDD/TTY Number</b>	
<b>Organization's FEIN</b>	
<b>Project's Contact Person (Name &amp; Title)</b>	
<b>Name/Title of Person Authorized to Negotiate Contract</b>	
<b>Telephone Number</b>	
<b>Name/Title of Person Authorized to Sign Contract</b>	
<b>Telephone Number</b>	

I hereby certify that, to the best of my knowledge, this proposal is complete and complies with the requirements of the Request for Proposal (RFP). The submission of this proposal has been authorized by the governing body of this organization.

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

## Budget Information Summary

	<b>Funding Request</b>	<b>Indirect Cost Rate (Include a copy of current approved Indirect Cost Agreement)</b>	<b>Total</b>
Personnel			
Travel			
Other Costs			
Total Cost for Presentation to NCI Works (If Applicable)			
<b>Total</b>			

## VI. Conditions/Assurances

In submitting this proposal, the respondent must agree to follow and abide by the conditions/assurances stated below. Please read each item carefully and sign where indicated. ***Include this section in your submission.***

- 1) BEST, Inc. reserves the right to reject any and all proposals which are not complete or not prepared in accordance with RFP guidelines.
- 2) BEST, Inc. retains the right to accept or reject any or all proposals received in whole or in part, to negotiate with any qualified sources, or to conceal in whole or in part proposals if it is in the best interest of BEST, Inc. to do so. BEST, Inc. will require selected respondents to participate in contract negotiations should they be necessary.
- 3) The submission of a proposal does not commit BEST, Inc. to award a contract or to pay any costs incurred in the preparation of a proposal, or to procure or contract for services or supplies prior to the issuance of a signed contract.
- 4) The contents of proposals submitted will become part of any contract award.
- 5) Proprietary rights to all products, data, materials, and documentation originated and prepared pursuant to a contract shall belong exclusively to BEST, Inc.
- 6) Contractors will be prohibited from disseminating products developed under contract with BEST, Inc. without prior written consent.
- 7) Contractors must participate in project reporting, evaluation, and monitoring required or conducted by BEST, Inc.
- 8) Contractors will be required to adopt the BEST, Inc. Grievance Procedures.
- 9) The Contractor shall operate and comply with the project described in the proposal, which will be included as a part of the contract. Any deviation from the project as defined in this proposal must be approved in writing by BEST, Inc. Failure to gain such written approval shall constitute breach of contract. In the event of breach of contract, BEST, Inc. reserves the right to impose sanctions as deemed appropriate.
- 10) **All** funds received pursuant to this contract must be used exclusively for the proposed project. Any expenditures or performances that exceed those agreed to in the contract are the sole responsibility of the contractor and shall not entitle him/her to additional payments or benefits.
- 11) The agency agrees to maintain a general liability or other type of insurance policy that will hold BEST, Inc. harmless from liabilities arising from bodily injury, illness, or other damages or losses of person or property, or any claims arising out of any activity under a WIA contract or agreement.
- 12) The Contractor agrees to permit BEST, Inc. or any of its authorized agents full access to and the right to examine any pertinent books, documents, papers, and records involving transactions related to the funding of this project as often as deemed necessary.
- 13) The Contractor must agree to hold BEST, Inc. and the Federal and State Governments harmless from liabilities arising from bodily injury, illness or damage of losses to person or property, or claims arising out of any activity under a WIA contract.

- 14) The Contractor agrees to maintain record confidentiality as required. The Contractor also agrees to retain all records pertinent to this project for a period of five (5) years from the date of final contract payment or until pending matters of litigation, audit, or other related claims are resolved. This includes but is not limited to financial, statistical and participant records and supporting documentation.
- 15) The Contractor must be able to maintain control over the accountability for all WIA funds received. The Contractor's financial management system must be able to provide for accurate, current, and complete disclosure of all project costs/expenditures.
- 16) The Contractor certifies that it possesses the legal authority to apply for WIA funds, enter into any contract awarded and execute the proposed project.
- 17) The contracting organization agrees to comply with all Federal and State non-discrimination provisions. Specifically, upon receiving funding under the WIA program, the contractor agrees that it will not discriminate on the basis of race, color, creed, religion, age, sex, physical or mental ability, marital status, arrest or conviction records (whenever appropriate), national origin, political affiliation, veteran status, or for persons with AIDS or HIV infection.
- 18) The Contractor agrees to meet all of the requirements or Section 504 of the Rehabilitation Act of 1973.
- 19) The Contractor agrees to meet all applicable labor laws, including Child Labor Law standards.
- 20) The Contractor affirms that it is not on any Federal, State of Illinois or local Debarment List.

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Signature

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Date

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Name of Authorized Representative

---

Title

## VII. Vendor's Federal Taxpayer Identification Number

Under penalties of perjury, I certify that \_\_\_\_\_ is my correct Federal Taxpayer Identification Number. I am doing business as a (Please check one):

- |  |  |
|--|--|
| <input type="checkbox"/> Individual                    | <input type="checkbox"/> Real Estate Agent       |
| <input type="checkbox"/> Sole Proprietorship           | <input type="checkbox"/> Government Entity       |
| <input type="checkbox"/> Partnership                   | <input type="checkbox"/> Tax Exempt Organization |
| <input type="checkbox"/> Corporation                   | <input type="checkbox"/> (IRC 501 (a) only)      |
| <input type="checkbox"/> Medical and Health Care       | <input type="checkbox"/> Trust or Estate         |
| <input type="checkbox"/> Services Provider Corporation |  |

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Signed

Date

Enter your taxpayer identification number in the appropriate space. For individuals and sole proprietors, this is your social security number. For other entities, it is your employer identification number. Federal Employer Identification Numbers (FEINs) must not be used for sole proprietorships.

If you do not have a TIN, apply for one immediately. To apply, get form SS-5, Application for a Social Security Number Card (for individuals) from your local Social Security Administration, or form SS-4, Application for Employer Identification Number (for businesses and all other entities), from your local Internal Revenue office.

To complete the certification if you do not have a TIN, fill out the certification indicating that a TIN has been applied for, sign and date the form, and return it to this agency. As soon as you receive your TIN, sign and date the form, and give it to this agency.

If you fail to furnish your correct TIN to this agency, you are subject to an IRS penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**WILLFULLY FALSIFYING CERTIFICATIONS OR AFFIRMATIONS MAY SUBJECT YOU TO CRIMINAL PENALTIES INCLUDING FINES AND/OR IMPRISONMENT.**