



Request for Quote
Customer Solutions
Workshops for Customer Success

RFQ 2023-101

Release Date: November 13, 2023

Submission Deadline: December 4, 2023

Purpose of RFQ

Eastern Indiana Works is soliciting proposals for a workshop facilitator to develop and lead interactive Customer Success workshops through various delivery models (in person, virtually or a hybrid delivery (preferred)) in the region. Customer Success will include the development and delivery of workshops for employers, community partners, and job seekers that are designed to prepare individuals for employment and to improve labor participation market outcomes in Eastern Indiana. The scope of these tools and products will be more fully defined by the selected vendor and Eastern Indiana Works through joint evaluation of industry best practices.

As part of the local One-Stop System, Eastern Indiana Works will be investing, as a result of this RFQ, funds for Customer Success workshops in One-Stop offices and virtual realm.

Selected service provider(s) must comply with all federal, state and local Workforce Innovation and Opportunities Act regulations and policies. The funds will be made available to provide services in Eastern Indiana Works system as early as January 1, 2024, through December 31, 2024. Annual contract renewal options may be available at the discretion of Eastern Indiana Works.

About Eastern Indiana Works

Eastern Indiana Works (EIW) is the Workforce Development Board for Economic Growth Region 6 (EGR6) which guides workforce development in a 9-county area. Counties that receive services from EIW include Blackford, Delaware, Fayette, Henry, Jay, Randolph, Rush, Union, and Wayne. EIW provides the service area with guidance to employment by collaborating with clients, businesses, and community organizations. Strong community partnerships help to provide the best outcomes for our clients. EIW serves adult, dislocated workers, in-school and out-of-school youth facing barriers to their employment and training goals. These types of barriers might include poverty status, transportation challenges, background issues, or education hurdles. EIW works diligently to provide support under grant funding to help our clients reach self-sufficiency through employment, skill-up training, and by supporting the client's needs during their career goal pursuit. Eastern Indiana Works has continued to solidify ourselves as a strong intermediary in our region for partners, employers, and education providers to connect them to create strong pipelines of talent in our region.

RFQ Summary

Eastern Indiana Works is seeking a vendor to develop up to twenty-four (24) 60-minute workshops with interactive elements to be delivered over a 12-month period. Eastern Indiana Works expects workshops or seminars to be delivered bi-weekly over the 12-month contract period. The workshops should vary with delivery in person, virtually and/or a hybrid delivery model (preferred).

Eastern Indiana Works is seeking responses which demonstrate workforce, staffing, and career development expertise, proficiency in engaging employers and job seekers, and innovative solutions for effective and efficient content delivery, standardization, and engagement. All potential vendor(s) must be able to demonstrate a measurable, positive impact on Eastern Indiana. Customer Success is an essential component of the overall One-Stop System and is described in some detail in order to provide vendors with a full understanding of the One-Stop System as it relates to this module. The goal of this RFQ is to provide meaningful resources and tools for both employers and job seekers.

The development, acquisition and dissemination of these products will be performed in conjunction with Eastern Indiana Works. Customer Success workshops will be for employers,

community partners and/or jobseekers. Eastern Indiana Works encourages the use of community and faith-based organizations, in order to more effectively serve the public workforce system.

The Customer Success module will identify the need for and will recommend new or updated client resources and tools. These recommendations regarding new or updated products should be based on national best practices and evaluations of regional One-Stop System effectiveness. Once products are developed, the selected vendor(s) will ensure Eastern Indiana Works and service providers are aware of changes to products and are appropriately trained to apply these changes within each module.

Primary Responsibilities:

- Research national best practices for workforce development and recommend the most promising practices which meet, or may be adapted to meet, the objectives of the One-Stop System.
- Identify varied content delivery methods of promising practices. Develop, deliver, and/or procure solutions that utilize these practices and help meet the objectives of the One-Stop System.
- Review Eastern Indiana Works' initiatives, programs and products to identify delivery methods, and other solutions to increase customer access and satisfaction. Evaluate the effectiveness of all Customer Solutions tools and resources on a regular basis and make improvements, as necessary.
- Ensure One-Stop Operations are aware of and as necessary, trained on One-Stop tools and resources, making certain there is consistent communication from One-Stop staff to clients.
- Collaborate with One-Stop Operations modules to identify the need to develop, procure, or update tools and resources.
- Collaborate with Eastern Indiana Works Employer Engagement teams to determine, develop and deliver business products

Customer Success module measurements are:

- Product Deployment Rate – The percentage of new or significantly upgraded products that are deployed each month versus a defined target.
- Resource Utilization Rate – The frequency of use of each resource.

The selected vendor(s) will foster a customer-centered service delivery approach that serves the broad needs of all communities within the region.

The selected vendor(s) will continue to usher in innovation and service excellence that is guided by a demand-side approach and is responsive to the needs of job-seeking customers and employers. The guiding principles of the service approach should:

- Be anchored in a commitment to develop exceptional customer skills.
- Have the foresight to continue to be responsive to the existing and emerging needs of the business community.
- Remain rooted in transparency and accountability.
- Position Eastern Indiana Works as a leader in participant development, customer service, and organizational leadership.

The One-Stop Center locations, days and hours of operation, and Center contact information can be found on Eastern Indiana Works' website at www.easternindianaworks.org. Staff supporting the daily operations of the Centers are not able to assist or answer questions related

to this RFQ. Questions related to this RFQ should be directed to Eastern Indiana Works point of contact listed in this RFQ.

Submission Requirements

Technical Qualifications

To be eligible for consideration, individuals or organizations submitting quotes may not have a financial or policy interest in Eastern Indiana Works and must demonstrate that they:

- 1. Have experienced staff or subcontractors to provide the services described in this quote or must show the ability to acquire such staff.
- 2. Have experience in performing similar types of services in the public or private sector.
- 3. Can contract with Eastern Indiana Works for the timely delivery of the services.
- 4. Can demonstrate the delivery of the specific workforce development services specified in this RFQ.

Quote Format

The Quote must be submitted in PDF format. Quotes must be typed in 12-point font double-spaced with one-inch margins and on letter size paper (8 ½ x 11). Pages must be numbered in the footer at the bottom center of each page in “Page X of Y” format.

Quote Timeline

The deadline for submission is December 4, 2023, by 12:00 noon (EST). Quotes should be submitted to:

Attn: Recca Jennings, VP of Operational Strategies

Email: rjennings@easternindianaworks.org

Website: www.easternindianaworks.org

Any questions regarding this Request for Quote must be submitted in writing by e-mail to rjennings@easternindianaworks.org by the Submission of Questions due date shown in the RFQ timeline below. Questions and responses will be posted on the Eastern Indiana Works website at www.easternindianaworks.org. Potential vendors should check the Eastern Indiana Works website regularly for posted correspondence.

Request for Quote Timeline

Issue RFQ:		November 13, 2023
Submission of Questions:	12:00 Noon (EST)	November 20, 2023
Quote Due Date:	12:00 Noon (EST)	December 4, 2023
Anticipated Contract Date:		January 1, 2024

Quote Components

To be considered for funding, all applications submitted must adhere to the following requirements:

Components	Evaluation Criteria	Maximum Pages
Organization and Staffing	<ol style="list-style-type: none">1. Description of organizational overview, experience, capacity, and qualifications including details on all successful projects that are similar in nature and scope2. Description of experience, capabilities and understanding of accounting requirements for contracts involving Federal and State of Indiana funding3. Overview of the organization's staff to provide requested services and identification of the roles of specified personnel	2
Quote and Budget Narrative	<ol style="list-style-type: none">1. The specific questions asked under Quote Narrative must be addressed2. Plans to achieve Customer Success module measurements3. A budget narrative that explains and supports the details contained in the budget worksheet.	4
Attachments*	<ol style="list-style-type: none">1. Proposal Cover Sheet (Attachment A)2. Budget Worksheet (Attachment B)3. Non-Collusion Affidavit (Attachment C)4. Assurance and Certifications (Attachment D)5. List of three (3) professional references with names, addresses, and current telephone numbers of contact persons for whom similar work has been performed6. Staff Qualifications (if personnel are not on staff – job or position descriptions) (Max. 1 page)7. Organization Audit Report <p>*Attachments listed above will not count against the page limit</p>	
	TOTAL PAGES (excluding attachments)	6

Proposal Cover Sheet

The required Proposal Cover Sheet is included in this RFQ as Attachment A. Attachment A should be completed with the required information and included as the cover page with the Quote.

Organization and Staffing

This portion of the Quote is to provide information about the responding organization and its staff. The objective is to measure the stability of the organization, the experience with similar engagements and the quality of the staff that will be utilized in this engagement. In short, that the respondent has the ability, resources and expertise to successfully deliver customer solutions in a progressive system.

The respondent is to present a narrative that addresses their ability to provide the services as outlined in this RFQ. The narrative should, at a minimum, address the points in the technical qualifications portion of this RFQ. The organization and staffing aspects that make the

respondent highly qualified for consideration should be addressed in this section. In addition, an organizational chart that includes key personnel names, resumes (or qualifications) for key personnel/positions, job descriptions and a copy of the organization's most recent financial audit must be provided. If partnering with other entities, a description of the relationship of the entities, roles, and partnership organization chart are also required.

Quote Narrative

The Quote Narrative will allow the respondent to provide information specifically about the services to be provided. The questions in this section allow the respondent to demonstrate knowledge in workforce development and how implementation and operation will occur to maximize performance. The respondent must answer each question. The respondent may provide a general narrative at the beginning. That narrative will be included in the page limitation.

Customer Solutions - Questions

1. Please describe your plan for implementing up to 24 workshops in a 12-month period and why they will be effective in serving our targeted populations.
2. Provide recommended workshops that would be implemented and a proposed frequency of delivery.

Budget Narrative

The contract for services under this RFQ will begin approximately January 1, 2024, and end on December 31, 2024. Annual contract renewal options may be available at the discretion of Eastern Indiana Works.

Respondents must provide detailed costs for the services outlined in this RFQ using both the budget worksheet (Attachment B) and a budget narrative.

Within the Quote Narrative each respondent must include a Budget. The Budget Narrative is intended to describe the services and products that are covered for the budgeted dollars and/or payment points at the major component level. The following should be included:

- Identify the major components or deliverables as viewed by the vendor
- Provide costs for each major component
- Provide projected people-hours of each major component
- Provide a brief description of the component deliverables

Example 1: The Payment Point A in the amount of \$##,000 covers the costs of the development of three workshops, the delivery of ## workshops, the creation and posting of labor market briefs and case studies, etc.

Example 2: The development of standard informational workshops will be billed at \$### each. We will develop five of these informational workshops during the first month for a total cost of \$#,000.

In the Budget Detail Sheet (Attachment B), the vendor must present the total costs for providing services and the costs for each major component within the scope of the Quote.

The proposed payment points and schedule of payments should be presented on the worksheet. Final payment points and schedule of payments will be negotiated during the contracting phase.

Selection Criteria

All vendors are advised that each Quote will be evaluated based on responsiveness to this RFQ. Quotes will be reviewed for completeness, clarity and adherence to stated requirements. Quotes will be rated based on the selection criteria and in rank order from the highest to lowest. Selections for contract negotiations will normally be made in rank order. However, to ensure availability of quality services, Eastern Indiana Works reserves the right to select lower ranked Quotes when warranted. Such selection of Quotes shall be made at the sole discretion of Eastern Indiana Works.

The evaluation will be worth a maximum of 100 points. The available points by evaluation factor are shown in the following chart:

Evaluation Factors	Maximum Points
Organization and Staffing	25
Proposal Narrative	50
Budget	25
Total Points	100

Terms & Conditions

1. A vendor or its principals shall be in good standing, not debarred or suspended, proposed for debarment, declared ineligible or otherwise excluded from entering into a financial agreement of federal or state funds.
2. Local, small, minority and women owned businesses are encouraged to respond and shall not be discriminated against during Quote review.
3. Eastern Indiana Works is an equal opportunity employer. All vendors shall certify the same.
4. The vendor certifies and agrees that it will provide and maintain a drug-free workplace.
5. Issuance of the Request for Quote does not commit Eastern Indiana Works to award a contract, to pay costs associated with Quote development or to procure or contract for goods and/or services. Payment for services will be negotiated.
6. Eastern Indiana Works reserves the right to reject any and all Quotes if it is in the best interest of Eastern Indiana Works to do so and waive any minor informalities or irregularities in the RFQ process. Eastern Indiana Works shall be the sole judge of these irregularities.
7. For the selected vendor(s), references or other points of contact as necessary will be made and any comments will be used to complete the evaluation process. Eastern Indiana Works reserves the right to enter into negotiations with one or more vendors as a result of the RFQ evaluation process and enter into a best and final negotiation with one or more of the vendors.
8. Eastern Indiana Works will consider non-responsive any submittal for which critical information is omitted, lacking or represents a major deviation from the RFQ.
9. Quotes received after the due date and time may be considered non-responsive and may not be reviewed or evaluated.

10. Other issues of grievances, hearing resolutions and authority shall be addressed prior to award of contract and relevant issues may be stated within contract. Eastern Indiana Works reserves the right to negotiate proposed outcomes, budget, and other matters prior to execution of the contract.
11. Vendors shall certify either no real or apparent conflict of interest exists in carrying out the scope of work described, or where conflict(s) of interest may exist; such potential conflicts must be clearly disclosed in the Quote.

Funding Available

Funding availability may vary based on federal allocations, the availability of non-federal funding and other factors. The following is Eastern Indiana Works estimated funding level for the initial term of the contract. Actual funding levels will be specified by contracts that are executed as a result of this RFQ.

Approximately \$55,000 will be made available for the period covered by this contract. If multiple providers are selected, \$55,000 will be the total dollar amount available.

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Attachment A

Proposal Cover Sheet- Customer Solutions (Customer Success Workshops) RFQ-2023-101

Proposing Organization's Name: _____

Mailing Address: _____

City/State/Zip: _____

Local Street Address: _____

City/State/Zip: _____

Organization Type and Legal Status of Organization: _____

If the organization is owned or controlled by a parent company, please specify: _____

Federal Employer Identification # (FEIN): _____

Dun and Bradstreet (D&B) # (http://www.dnb.com/us): _____

Unique Entity ID (SAM) # (http://sam.gov): _____

Contact Information (Individual Submitting the Proposal)

Name: _____

Title: _____

Telephone Number: () _____

Email Address: _____

Contact Information (Individual Authorized to negotiate and sign Contract if Proposal is accepted)

Name: _____

Title: _____

Telephone Number: () _____

Email Address: _____

Attachment B

Budget Detail Sheet- Customer Solutions (Customer Success Workshops) RFQ-2023-001

Vendor must present the total costs for providing services and the costs for each major component within the scope of the Quote.

Service Delivery Component	Detailed Description	Cost
Total Cost of Proposed Quote		\$

Attachment C

NON-COLLUSION AFFIDAVIT

State of Indiana

County of _____

The respondent is hereby giving oath that it has not, in any way, directly or indirectly, entered into any arrangement or agreement with any other respondent or with any officer or employee of Eastern Indiana Works whereby it has paid or will pay to such other respondent or officer of employee any sum of money or anything of real value whatever; and has not, directly or indirectly, entered into any arrangement or agreement with any other respondent or respondents which tends to or does lessen or destroy free competition in the letting or the agreement sought for by the attached response; that no inducement of any form or character other than that which appears on the face of the response will be suggested, offered, paid, or delivered to any person whomsoever to influence the acceptance of the said response or awarding of the agreement, nor has this respondent any agreement or understanding of any kind whatsoever, with any person whomsoever, to pay, deliver to, or share with any other person in any way or manner any of the proceeds of the agreement sought by this response.

Signature of Authorized Representative

Print or Type Name

Subscribed and sworn to me this _____ day of _____, 2023.

Notary Public

County of: _____

Commission Expiration Date: _____

Attachment D

ASSURANCES AND CERTIFICATIONS

The respondent assures and certifies to each of the following items:

- The bidding organization agrees to comply with all applicable State and Federal laws and regulations governing the Workforce Innovation & Opportunity Act, Eastern Indiana Works, and any other applicable laws and regulations.
- The bidding organization has not been debarred or suspended or otherwise excluded from or ineligible for participation in federally funded programs.
- The bidding organization possesses legal authority to offer the attached proposal.
- A drug-free workplace will be maintained in accordance with State of Indiana requirements.
- By submitting a proposal, the bidder certifies to his/her knowledge and belief that there is no conflict of interest (real or apparent) inherent in the bid or in delivering the plan of work if Eastern Indiana Works awards a contract. A conflict of interest would arise if any individual involved in the preparation of this RFP, proposal review and rating or award decisions has a financial or other interest in or represents the bidding organization and would be likely to gain financially or personally from the award of a contract. The same would hold true for any member of the individual's family, partner, or an organization employing or about to employ any of the above as a direct result of the successful award of a contract under the RFP. Eastern Indiana Works reserves the right to disqualify a bid should a conflict of interest be discovered during the solicitation process.
- The bidding organization assures that if awarded a contract by Eastern Indiana Works, it will comply with Regional, State and Federal program and financial monitoring requirements. This means the bidder will make available required information (both program and financial) as is required to satisfy local, state, and federal monitoring expectations.
- The bidding organization assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws: Section 188 of the Workforce Innovation & Opportunity Act; Title VI of the Civil Rights Act of 1964, as amended; Section 504 of the Rehabilitation Act of 1973, as amended; The Age Discrimination Act of 1975, as amended; and Title IX of the Education Amendments of 1972, as amended. The bidding organization also assures that it will comply with 29 CFR Part 38 and all other regulations implementing the laws listed above. This assurance applies to the WIOA Title I financially assisted program or activity, and to all agreements that Eastern Indiana Works makes to carry out the WIOA Title I financially assisted program or activity. This WIOA Title I funded program is an equal opportunity employer/program. Auxiliary aids and services will be made available upon request for individuals with disabilities. By submitting a bid all bidders are providing an assurance that they will comply with the above nondiscrimination and equal opportunity provisions.

Signature of Authorized Representative

Print or Type Name

Date