

Thomas P. Miller and Associates  
Serving as Independent Procurement Entity For:



Kaiser Group, Inc.;  
DBA Dynamic Workforce Solutions

**REQUEST FOR PROPOSAL FOR:  
Virtual Coaching and Webinar/Workshop Services**

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Release Date: August 19, 2019

Proposals Due: 5:00 pm EST, September 19, 2019

Contract Period: 10/1/19 – 9/30/20\*

\*The initial contract period is for 12 months with up to 4 renewals annually thereafter for a maximum contract period of 5 years.



## Contents

<b>Section 1: Background Information</b> .....	3
Dynamic Workforce Solutions .....	3
Thomas P. Miller & Associates, LLC .....	3
Project Timeline & Funding.....	4
<b>Section 2: Scope of Work</b> .....	5
<b>Section 3: Submission &amp; Evaluation</b> .....	6
Bidders Questions .....	6
Proposal Instructions .....	7
Evaluation and Award .....	7
Notice of Award .....	7
Appeals Process .....	7
Accessibility and Equal Opportunity .....	8
Contract Award .....	8
Attachment A: Cover Sheet .....	9
Attachment B: Conflict of Interest Form.....	10
Attachment C: Budget.....	11
Attachment D: References.....	12



## Section I: Background Information

### Dynamic Workforce Solutions

Dynamic Workforce Solutions/Kaiser Group, Inc. (DWFS) was established in 1979. Throughout its history, they have specialized in delivering superior, cutting-edge solutions for workforce development programs. DWFS' programs serve employers, WIOA Adults and Dislocated Workers, Wagner-Peyser customers, Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF) participants, Trade Adjustment Assistance (TAA) customers, Veterans, and WIOA Youth, as well as other specialized federal, state, and local grant programs. DWFS has been an ISO-certified company since 2001. Its governance structure is a for-profit Wisconsin corporation governed by a three-member Board of Directors. DWFS offers workforce development program assessment and evaluations, One Stop Center and programmatic operations management (Adult, Dislocated Worker, and Youth), business services management, and consulting, training and organizational solutions to non-profit, for-profit, and government clients throughout the United States.

**Our Mission:** The DWFS team members drive economic growth in the communities we serve by providing innovative, reliable, workforce development and training solutions that result in a prepared talent pipeline positioned for tomorrow's jobs.

**Our Commitment:** DWFS commits to maintaining a culture of partnering with our customers and are engineered to drive continuous improvement with measurably exceptional performance. We are a highly effective team that delivers Extreme Customer Service and outstanding outcomes for the people and businesses we serve.

**Our Customers:** DWFS specializes in delivering superior, cutting-edge solutions for workforce development and career planning entities. Workforce Center and programmatic operations (Adult, Dislocated Worker, and Youth) management, business services management, and consulting, training and organizational solutions to non-profit, for-profit, and government clients throughout the United States and work international marketplace.

For more information of DWFS, please visit their website at <http://www.dwfs.us/>.

### Thomas P. Miller & Associates, LLC

Thomas P. Miller & Associates, LLC (TPMA) has been contracted by the DWFS to lead the procurement process for selecting a provider for Virtual Coaching and Webinar Services. TPMA is a full-service consulting firm based in Indianapolis, Indiana with over 30 years of experience in workforce development activities, including providing assistance to workforce boards in strategic planning exercises. Through analysis, alignment, and action, TPMA applies our mission statement of empowering organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change to every project assigned. For more information of TPMA's experience and expertise, please visit us at <http://www.tpma-inc.com>.

As the contracted entity to lead this procurement process, TPMA serves as a separate and independent outside entity to conduct the competition for the provider for Virtual Coaching and Webinar Services. TPMA will review all submitted proposals and evaluate them on a scale coordinated and agreed upon by DWFS, with guidance from the U.S. Department of Labor. Based on its evaluation, TPMA will submit its



selection, along with a description of the selection process and scoring justification, to the DWFS leadership for approval.

### **Project Timeline & Funding**

The table below provides a timeline of activities for this procurement. In the event dates are changed, TPMA will provide notice through the procurement portal:

<b>Activity</b>	<b>Date</b>
RFP Released	8/19/19
RFP Questions Deadline	9/2/19
Response to Questions Posted	9/5/19
Proposal Deadline	9/19/19 – 5:00pm EST
TPMA Evaluates Bids & Interviews (if applicable)	9/20/19 – 9/24/19
TPMA Provides Recommendation to DWFS	9/25/19
Notification of Award	9/27/19
Contract Period	10/1/19 – 9/30/20



## Section 2: Scope of Work

The scope of work for this contract should include a proposal for providing Virtual Coaches and Workshop/Webinar Presenters. Organizations must have the ability to receive referrals from multiple funding sources and be able to include names of clients and additional details as requested in preparation of invoicing protocols. Organizations must also follow DWFS invoicing policies and procedures to submit timely and accurate data for billing. Following are the expectations and requirements of the Virtual Coaches and Workshop/Webinar Presenters:

**Virtual Coaches:** This RFP is requesting virtual coaches to provide coaching to hundreds of individuals monthly. The individuals receiving virtual coaching services should be able to, at a minimum, auto-schedule (via online system) sessions with preferred Coach; obtain workforce appropriate training during session; and make progress towards career pathway goal during session period. Sessions can occur as required by operation receiving services (weekly, twice monthly, etc.) and must be available 7 days per week, with non-traditional scheduling times. Coaches must be able to write and file a secure case note about the session, as required by funding entity. All sessions should be conducted in one-hour increments and shall be all-inclusive for that duration. DWFS will not pay for extra development of training materials, coaching exercises, case notes, and/or required reporting from coaches.

*Note: There is a need to have hundreds of individuals receive private (Or one coach to one client ratio. No group coaching) coaching services monthly.*

Virtual Coaches must meet the following criteria:

- A master's degree from an accredited university or college preferred. Experience in Social Work, Career Counseling or Coaching, or Workforce Development required
- 5 years minimum experience counseling or coaching
- At least 2 years' experience working with at risk populations (both adult and youth with barriers to employment)
- Skilled in Person Centered Planning, Motivational Interviewing, SMART Goals, rapport building, customer service, and problem solving skills
- Ability to manage comprehensive caseload
- Available during traditional and non-traditional hours
- Strong adherence to Ethics and Professional Standards of the American Counseling Association
- Advanced Computer Skills, ability to use internet, scheduling tools, SMS or text messaging
- Strong ability to provide additional resources/assignments for clients
- Able to Identify and assist in removing client barriers
- Knowledgeable of workforce development
- Strong assessment skills and able to create coaching plan with client
- Strong verbal and written communication skills required
- Ability to work independently with minimal supervision
- All Virtual Success Coaches will be required to have their own personal computer and internet service and computers should be webcam functional with headset
- All Virtual Success Coaches are trained and certified in Preventing Sexual Harassment, Ethics in the workplace and Diversity in the Workplace
- Must have ample amount of coaches available to coach a scheduled session in the event the anticipated/scheduled coach becomes unavailable
- Evaluation criteria regarding client experience must be made available upon request



**Workshop/Webinar Presenters:** This RFP is seeking also presenters to provide virtual workshops and webinars to individuals. Individuals receiving workshop/webinar services should be able to, at a minimum, auto-schedule (via online system) sessions to attend preferred workshops; obtain workforce appropriate training during session; and make progress towards career pathway goal during session period. Sessions can occur as required by operation receiving services (weekly, twice monthly, etc.) and must be available 7 days per week, with non-traditional scheduling times. Workshop Trainers must be able to write and file a secure case note about the session, as required by funding entity.

*Note: There is a need to have hundreds of workshops provided quarterly. Workshops may be provided to groups of clients from multiple locations and are not intended to be offered in a one-on-one setting. DWFS will not pay for the development of workshop materials. Responding entity must have developed curricula with pertinent topics that address entry level to advanced level employee essential workplace skills development.*

Webinar/Workshop Trainers must meet the following criteria:

- College degree
- Minimum 1 year experience presenting live webinars
- At least 2 years' experience working with diverse populations, facilitation of workshops and/or webinars related to workforce development
- Strong computer skills and virtual technology skills
- Excellent communication skills and able to engage in dialogue during live webinars
- Able to present a minimum of 20 webinars per week during traditional and non-traditional hours
- Preparation of topic materials converted from traditional classroom to online presentation
- Exceptional customer Service
- All Virtual Webinar presenters will be required to have their own personal computer with webcam, headset, and internet service
- All Workshop/Webinar presenters are trained and certified in Preventing Sexual Harassment, Ethics in the workplace and Diversity in the Workplace
- Access and license to Skype, Go To Meeting or similar, secure webinar tool

Proposals should include a scope of work for both Virtual Coaches **and** Workshop/Webinar Presenters. Two separate contracts will not be issued.

## Section 3: Submission & Evaluation

### Bidders Questions

All questions that interested parties may have can be directed to the third-party procurement agent, TPMA, Kristopher Subler at: [ksubler@tpma-inc.com](mailto:ksubler@tpma-inc.com). Questions must be submitted via email between August 19, 2019 and September 2, 2019. Responses to questions will be posted by September 5, 2019 on the TPMA procurement portal website, <https://www.tpma-inc.com/dwfs-procurement> along with other relevant information, including the RFP, procurement timeline, contact information, etc.

An entity's failure to submit a complete proposal or to respond in whole to RFP requirements will result in the proposal being deemed non-responsive and thus ineligible for funding. A proposal may also be



deemed “non-responsive” if the submitted price is found to be excessive or inadequate as measured by criteria stated in the RFP, or the proposal is clearly not within the scope of the project described and required in the RFP. DWFS reserves the right to cancel this procurement at any time, for any reason.

### Proposal Instructions

Each bid should be completed entirely, should not exceed 10 pages, and be typed in font no larger than 12-point font, single-spaced, 1” margins on all sides. Bids should include page numbers and table of contents. The cover page, table of contents, and attachments will not count against the 10 page limit. Once completed, interested parties must submit their proposal electronically to Kristopher Subler at [ksubler@tpma-inc.com](mailto:ksubler@tpma-inc.com). Please have your proposal organized in the following manner for each component:

- Attachment A: Cover Page
- Attachment B: Conflict of Interest Form
- Attachment C: Budget Form & Narrative
- Attachment D: Reference Form and Letters
- Documentation of registration for private, for-profit, or non-profit organizations (if applicable)
- Two (2) Years of Audited Financial History
- Organizational Chart
- Proposal (scope of work)

Bids that fail to follow this order will risk losing points in their overall score.

### Evaluation and Award

Proposals will be evaluated by the TPMA procurement team to ensure each submission meets all criteria outlined in this RFP. The procurement team will develop and use a scoring matrix to evaluate each proposal. Each section of the scoring matrix is worth the following amount of points:

Section	Points
Organization Experience	30
Capacity and Scope of Work	20
Technology, Data, & Reporting	20
Budget/Fiscal Accountability	20
Attachments & Formatting	10
<b>TOTAL</b>	<b>100</b>

All items that are mandatory (e.g., inclusion of attachments, financials, etc.) are considered pass/fail. If necessary, TPMA will conduct phone interviews to clarify any concerns or questions.

### Notice of Award

All respondents will be notified by TPMA via email as to their award status. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to this effect to Chris Berry at [cberry@dwfs.us](mailto:cberry@dwfs.us).

### Appeals Process

Dynamic Workforce Solutions is the responsible authority for handling protests regarding the procurement and bid selection process. Once a procurement decision is made, Dynamic Workforce Solutions shall notify each respondent in writing of the results. Unsuccessful respondent shall be advised,



in writing, that they have the right to request a debriefing or to request a hearing. The Request for a Hearing must be sent by registered mail or hand delivered (receipt will be issued), clearly identified externally as “Dated Material” and addressed to:

Mr. Chris Berry, Chief Financial Officer  
Dynamic Workforce Solutions  
15 Smokehouse Place  
Palm Coast FL, 32164

Facsimile and e-mail notices will NOT be accepted

### **Accessibility and Equal Opportunity**

TPMA and the DWFS is committed to equal access for all customers to all services. All contractors must ensure equal opportunity to all individuals. No individual or organization shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any Workforce Innovation and Opportunity Act funded program or activity because of race, color, religion, sex, gender identification, national origin, age, disability, English proficiency, sexual orientation, political affiliation or belief. All entities are expected to demonstrate full compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws. This includes ensuring contract staff receive accessibility training and may involve developing accessibility plans. All respondents must ensure all written materials and communications include the statement: “Reasonable accommodations and auxiliary equipment and services are available upon request.”

### **Contract Award**

The contract will be awarded based on the most responsive bidder whose offer is most advantageous to DWFS in terms of cost, functionality, and other factors specified in this RFP. The award may be negotiated at the discretion of DWFS or made on the basis of the initial bid/offer received, without discussions or requests for best and final offers.

The initial contract period is for 12 months with up to 4 renewals annually thereafter for a maximum contract period of 5 years.





## Attachment A: Cover Sheet

Please complete this **mandatory** cover sheet accordingly.

Organization Name				
Address				
Phone Number				
Number of Years in Business				
DUNS #				
Acknowledgement that Proposing Entity is up-to-date on taxes and not currently debarred or suspended.			YES	NO
Type of Organization (check all that apply)	<input type="checkbox"/>	Higher Education	<input type="checkbox"/>	Private
	<input type="checkbox"/>	Community-Based Org.	<input type="checkbox"/>	Business Organization
	<input type="checkbox"/>	Government Agency	Other (explain)	
	<input type="checkbox"/>	Labor Organization		
	<input type="checkbox"/>	Non-Profit		
	<input type="checkbox"/>	Employment Service State Agency (Wagner-Peyser)		
Number of Years of Experience Providing Counseling or Coaching	<i>(must be at least 5 years)</i>			
Number of Years of Experience Presenting Live Webinars	<i>(must be at least 1 year)</i>			
Contact Person				
Contact Person's Email Address				
Signatory Authority Signature				



## Attachment B: Conflict of Interest Form

By submitting a proposal, the authorized signatory authority of the bidding entity 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 scope of work if Dynamic Workforce Solutions awards a contract. A conflict of interest would arise if any individual involved in the preparation of this proposal and delivery of services has a financial or other interest or 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. Dynamic Workforce Solutions reserves the right to disqualify a bidding entity should a conflict of interest be discovered during the solicitation process.

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Signatory Authority Name and Title	Signature	Date
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*Note: This form is a **mandatory** required document to be considered for either component. Bidders should only complete this form once per entry.*



## Attachment C: Budget

Please complete the **mandatory** budget form and narrative explanation below. In creating a budget, the applicant should provide per unit costs by completing the following table. Bids must identify the wage rate of staff providing one-hour coaching sessions and workshops. Also provide the per unit price that you will charge DWFS for the one-hour coaching sessions and workshops/webinars. The charged rate should be all inclusive of your expenses and profit.

Additionally, please indicate if there are reduced rates at a high volume due to cost savings, if applicable. Please provide the per unit costs and charges when you would realize a volume discount. In the budget narrative, identify the volume you need in order to realize the reduced pricing. The budget narrative should also detail how you calculated the price you will charge DWFS and what is included in the inclusive rate.

<b>Virtual Coaches</b>	<b>One Unit</b>	<b>Volume Pricing</b>
Wage Rate for One-Hour Coaching Session	\$	
Price you will charge DWFS for One-Hour Coaching Session (inclusive cost)	\$	
<b>Workshop/Webinar Presenters</b>		
Wage Rate for One-Hour Webinar/Workshop per Client	\$	
Price you will charge DWFS for One-Hour Webinar/Workshop per Client (inclusive cost)	\$	

**Budget Narrative:** Please provide a detailed explanation for each budget line item to justify the cost.



**Attachment D: References**

Bidders are **required** to provide three references who can verify their experience, along with a contact phone number and email address. References should be for experience in the past 5 years.

Reference Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Reference Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Reference Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_