



REQUEST FOR INFORMATION: PLANNING AND GRANT WRITING SERVICES

This Request for Information (RFI) consists of 7 pages beginning with this one.

Employ Milwaukee, Inc. (EMI) is soliciting quotes from qualified professional firms to supply planners and grant writers, complying with all terms and conditions described in this document.

Proposals will be accepted no later than **4:00 PM CST, September 14, 2020**. Proposals received after this time will not be accepted. See *3.3 Submission of the Response*.

Mark all documents **RFI PLANNING & GRANT WRITING**. Email all documents to:

Julie.cayo@employmilwaukee.org

ATTN: JULIE CAYO, DIRECTOR OF RESEARCH AND PLANNING
EMPLOY MILWAUKEE, INC.
2342 N 27TH STREET
MILWAUKEE WI 53210

Proposals must be manually signed on this EMI form in the space provided below.

Please submit **one (1) digital PDF file**.

I have read the terms and conditions of this RFI and submit for consideration the attached proposal and exhibits, if any.

The fees and costs in this proposal have been arrived at independently, and have not been divulged, discussed, or compared with the proposals of other respondents. No attempt has been made nor will be made to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.

Company Name:

Company Telephone Number:

Company Address:

Company Fax Number:

City, State, Zip Code:



Email Address:

Authorized Signer's Full Name and Title:

Authorized Signature and Date:

Federal Tax ID Number:

1.0 REQUEST FOR INFORMATION OVERVIEW

Project Name: Planning and Grant Writing Services

RFI Release Date: August 25, 2020

RFI Due Date: 4:00 PM CST, September 14, 2020

1.1 Definitions

Contractor means each successful respondent awarded a contract.

Agency means the Employ Milwaukee, Inc.

EMI means the Employ Milwaukee, Inc.

Proposer/vendor/respondent means a firm submitting a response to this RFI.

RFI means Request for Information.

1.2 Scope of Services Sought

EMI seeks to establish a list of pre-qualified planners and grant writers with a detail-oriented work style who thrive on problem-solving, multi-tasking, meeting deadlines, facilitating diverse teams, and submitting high-quality work products that win competitions for funding. Successful candidates, who will be hired for individual projects, must have the ability to respond to complex planning initiatives, federal, state, and foundation grant application requirements, and align the components to the Agency's initiatives and organizational structures. The selected writers will be intimately familiar with living by calendars and things-to-do lists. Successful candidates will have the ability to lead teams in rolling up their collective sleeves to produce high-quality, winning proposals in a short time period.

Successful candidates should have a knack for relationship building and the ability to maximize team members' strengths. Successful candidates must demonstrate the ability to draft planning documents and all sections of a grant application based on interviews, research, documents and other resources. Planning and grant development work also includes editing, formatting and timely submission of final plans and proposals. Successful candidates will help ensure that EMI, the largest workforce development board in Wisconsin, can provide its customers (employers and job seekers) with training and employment opportunities. Successful



candidates will be able to complete high-quality planning initiatives and grant applications that are submitted in a timely fashion and will exhibit effective engagement of stakeholders as defined by the Agency for each project.

The qualifications are as follows:

- 1) Candidates must have the ability to clearly communicate verbally and in writing.
- 2) Candidates must have the ability to organize effectively.
- 3) Candidates must have three to five years of grant writing experience.
- 4) Candidates with education, employment, and training experience are preferred.
- 5) Candidates must have the ability to facilitate productive meetings.
- 6) Candidates must have the ability to allocate time and resources effectively.
- 7) Candidates must be able to work in a fast-paced environment while multi-tasking.
- 8) Candidates must have knowledge of current research and best practices in workforce development.

Contracts will be issued based on individual planning projects and grant applications. The duration of the project may include planning and grant development activities prior to the release of the application through the submission of the application. This period of time may range from 6 weeks to 6 months in duration, depending upon the targeted project. Federal applications, the greatest area of focus, generally have a 6-8 week period from application release date to the submission deadline. Foundation applications vary greatly in timelines, but often are on a quarterly or bi-annual funding schedule. These contracts may be issued anytime between October 1, 2020 through September 30, 2024.

1.3 Minority Business Participation

EMI, as a recipient of State and Federal funds, subscribes to the practices below and will fully comply with Federal, State, and Local laws and directives governing non-discrimination, equal opportunity, and affirmative action in all activities.

- No person shall be discriminated against whatsoever on the grounds of race, religion, color, age, sex, physical handicap, or national origin.
- No person shall because of race, religion, color, age, sex, physical handicap, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity funded entirely or in part by the City, the State, or the Federal Government.
- Affirmative Action shall be taken by all levels of governments, where necessary, to support the underlying objectives of said anti-discrimination policies.

To further support policies relative to affirmative action, equal opportunity, and non-discrimination, EMI will make every effort to ensure that Minority Business Enterprises have the maximum practicable opportunity to participate in construction contracts and in the procurement of goods, professional services, and supplies.

Contractors are encouraged to indicate in their RFI response if they are a certified minority business as certified through the State of Wisconsin. A listing of certified minority businesses, as well as the services and commodities they provide is available from the Department of Administration, Office of the Minority Business



Program, 608-267-7806. The listing is published on the Internet at:
<http://www.doa.state.wi.us/dsas/mbe/index.asp>.

2.0 ABOUT EMPLOY MILWAUKEE, INC.

It is expected that successful vendors will establish a strong partnership with EMI. As a strong partner, successful vendors will need to become fully acquainted with EMI. EMI is a 501(c) 3, non-profit organization. As the workforce development board for Milwaukee County, EMI is committed to supporting Milwaukee county residents in their search for economic self-sufficiency and supporting local businesses by collaborating with them to create a talent pipeline for a knowledge-based economy. EMI manages a sector-focused education, training and employment system that involves local educators, prospective training operators, area employers, job seekers and employees.

EMI's workforce strategy coordinates labor demand (employer-identified talent and skill needs) and labor supply (individuals with varying levels of education, skills, and barriers to employment) with a goal of connecting people to employment for a lifetime. EMI is at the center of this model, serving as a workforce intermediary that brings together all of the workforce and economic development partners for planning and coordination purposes.

EMI's Industry Advisory Boards are employer-driven and deeply committed to providing labor demand expertise in regional growth sectors including manufacturing, construction, hospitality, financial services, and healthcare. Representing labor supply is the EMI Coordinating Council, a formal network of community-based organizations that provide specialized services to address barriers to employment for residents.

More information on EMI can be found at www.employmilwaukee.org.

3.0 INSTRUCTIONS TO THE VENDOR

3.1 Communication/Questions

Vendors are expected to raise any questions, or additions they have concerning the RFI document as soon as they become aware of them. Any questions or requests for clarifications must be directed **in writing** to Julie.cayo@employmilwaukee.org no later than August 30, 2020 at 4 PM CST. The subject line of the email must be labeled "**RFI PLANNING & GRANT WRITING QUESTION.**" The only contact allowed with EMI staff is through julie.cayo@employmilwaukee.org as stated above. **Unauthorized contact of any EMI employee is cause for rejection of the RFI response.** Any additional information or clarifications that are provided to one bidder will be provided to all bidders in the form of an addendum posted to the EMI portal at <http://www.employmilwaukee.org>. Vendors are responsible for checking this site for any addenda that may be issued.

3.2 Calendar of Events

The dates set forth below are for informational purposes only. All dates are tentative and subject to change.

Milestone	Date
Issue RFI	8/25/20



Deadline for Submission of Written Questions	8/30/20
Proposal Due Date	9/14/20
Proposal Evaluations and Negotiations	9/30/20

3.3 Submission of the Response

Respondent must email **one (1) PDF file to:**

Julie.cayo@employmilwaukee.org

ATTN: JULIE CAYO, DIRECTOR OF RESEARCH AND PLANNING

EMPLOY MILWAUKEE, INC.

2342 N 27TH STREET

MILWAUKEE WI 53210

3.4 Evaluation Criteria

An EMI evaluation committee will be established to evaluate proposers' responses to each of the RFI requirements. Each response will be reviewed, discussed, evaluated, and ranked by each of the committee members. Proposals should be complete on their face. However, after opening of responses, EMI reserves the right to waive irregularities in any proposal, to request clarifying information it deems appropriate from one or more respondents, to request supplemental information from all of the respondents, and to factor any additional information into the evaluation. EMI may or may not require oral presentations of a group of finalists in person or on the telephone and may request further information from those finalists.

Proposals will be ranked based on the following criteria:

Criteria	Description	Points
Responsiveness	Compliance with proposal submission requirements.	Pass/Fail
Signed Cover Page	Proposer must submit the cover page signed by an authorized signatory.	Pass/Fail
Cost Proposal Form	The cost must be set forth on the Cost Proposal Form (Exhibit A) or will not be considered responsive and will not be reviewed.	Pass/Fail
Conflicts of Interest	Identify and explain any potential conflicts of interest.	Pass/Fail
Vendor References	Satisfaction of past customers as determined through customer references.	10%
Proposer's Qualifications/Experience with Like Projects	Describe your previous experiences leading initiatives, including development of U.S. Department of Labor, Wisconsin Department of Workforce Development, and private foundation grants.	30%



Statement of Familiarity with EMI	Explain your knowledge and understanding of EMI.	10%
Past Experience with Community Partners	Detail your past experience engaging community partners for a specific purpose.	20%
Continuing Knowledge of Workforce Development Strategies	Explain how you ensure that your knowledge of workforce development strategies remains current.	10%
Cost	Pricing of proposed services must be quoted on a per grant and/or per hour basis on Cost Proposal Worksheet (Exhibit A).	20%

All proposals that are deemed qualified will be included on a planning and grant writing list for use in future projects, contingent upon available funding and agency needs. Qualified respondents will receive a “Pass” determination on the first four (4) criteria and 80% or higher total on the remainder of criteria. Respondents will be contacted on a case by case basis for consulting work.

4.0 PROPOSAL FORMAT AND CONTENT

Responses are to be formatted and tabbed in the form and sequence described in Section 4. Responses not following the format outlined will not be considered. The evaluation and selection of a vendor will be based on the information submitted in the vendor’s response. Elaborate proposals (*i.e.* expensive artwork) beyond that sufficient to present a complete and effective response, are not necessary or desired. Additional data can be provided in appendices. Quality, not quantity, is desired.

4.1 Response Organization

TAB A: Signed Cover Page

The EMI cover page must be signed by a vendor representative authorized to make contractual obligations and submitted as Tab A of the response. Please include all contact information.

Failure to include this in your response will result in rejection of the RFI.

TAB B: RFI Response (Excluding Price)

Section 1: Vendor References (10%)

Present your firm’s proven track record by providing three client references. Please provide organization names and addresses, along with the names and phone numbers of the individual(s) you would propose EMI contact for references. These should ideally be projects at which your proposed candidates played a project manager role.

EMI reserves the right to contact or visit any party listed as a reference that has previously used, or is presently using your products or services in a manner similar to those being proposed. EMI also reserves the right to use other sources to obtain information about the proposed products and services.



Section 2: Proposer's Qualifications /Experience with Like Projects (30%)

Describe your previous experiences leading initiatives, including development of U.S. Department of Labor, Wisconsin Department of Workforce Development, and private foundation grants.

Section 3: Statement of Familiarity with EMI (10%)

Explain your knowledge and understanding of EMI.

Section 4: Past Experience with Community (20%)

Detail your past experience engaging community partners for a specific purpose.

Section 5: Continuing Knowledge of Workforce Development Strategies (10%)

Explain how you ensure that your knowledge of workforce development strategies remains current.

TAB C: RFI Response (Cost Proposal Worksheet) (20%)

You must fill out the Cost Proposal Worksheet (Exhibit A) with your pricing. Pricing must be quoted on a per grant and/or per hour basis. If the Cost Proposal is not clear, you may ask questions as set for herein in section 3.1

Failure to include your pricing on the Cost Proposal Worksheet (Exhibit A) will result in rejection of the RFI. Do NOT submit cost information in any other format.

TAB D: Designation of Information as "Confidential" or "Proprietary"

You may fill out and submit the attached "Request to Designate Information as Confidential or Proprietary" form if you seek to designate any portion of your response as confidential or proprietary. Please note that the Board is bound by the Wisconsin Public Records Law, and as such, all of the terms of this Contract are subject to and conditioned on the provisions of Wis. Stat. § 19.21, *et seq.*

TAB E: Additional Materials, Brochures, Etc.

Please only include relevant and necessary information.

5.0 Contracts

EMI will not sign a vendor's forms or contracts. Unless otherwise indicated, awarded vendor will be required to sign EMI's Professional Services Contract.

6.0 Appeals

Appeal may be filed at any time during the procurement process, but not later than 5 days after EMI's public notification of bid tabulation and recommendation of award. Information on the written appeal process is available upon request.