



REQUEST FOR PROPOSALS: VIRTUAL SERVICE DELIVERY PLATFORM SERVICES

This Request for Proposals (RFP) consists of 12 pages beginning with this one.

Employ Milwaukee, Inc. (EMI) is soliciting proposals from qualified professional firms to supply a virtual service delivery platform, complying with all terms and conditions described in this document.

Responses will be accepted no later than **4:00 PM CST, July 18, 2021**. Responses received after this time will not be accepted. See *3.3 Submission of the Response*.

Mark all documents **RFP VIRTUAL SERVICE DELIVERY PLATFORM**. Email all documents to:

carlton.thompson@employmilwaukee.org

ATTN: CARLTON THOMPSON, DIRECTOR OF IT AND FACILITIES
EMPLOY MILWAUKEE, INC.
2342 N 27TH STREET
MILWAUKEE WI 53210

Responses must include the signed EMI form on Page 2 of this RFP.

Please submit **one (1) digital PDF file** of the full proposal with the signed form and attachments.



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I have read the terms and conditions of this RFP 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:

City, State, Zip Code:

Company Website:

Authorized Signer's Full Name and Title:

Email Address:

Authorized Signature and Date:

Federal Tax ID Number:



1.0 REQUEST FOR PROPOSAL OVERVIEW

Project Name: Virtual Service Delivery Platform

RFP Release Date: June 18, 2021

RFP Due Date: 4:00 PM CST, July 18, 2021

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 RFP.

RFP means Request for Proposals

1.2 Scope of Services Sought

EMI seeks a provider to plan, design, and implement a digital service delivery platform for use by participants, service providers, community partners, employers, and staff that will offer a wide spectrum of workforce development services and increase the overall technological capacity of Milwaukee County’s workforce ecosystem.

Employ Milwaukee has a broad portfolio of programs and services with various functional elements of service delivery that will be provided by the digital platform:

- Program recruitment and orientation sessions
- Career exploration and career interest assessments
- One-on-one and group case management and mentoring
- Professional development workshops
- Youth enrichment and leadership development workshops
- Virtual job fairs and hiring events

Specific hardware and software needs will be identified in the planning and development phase; however, current best practices and examples suggest a combination of all or some of the following needs:

No	Baseline	Customization Options
	Functionality	
1	Landing page with clean and intuitive user experience	Branding (logos, colors), order of main menu tiles; role-based showing/hiding of tiles for customized experience. Customized icons (keeping it simple).
2	Orientation Videos with time tracking and controls to reduce non-engagement	Number of videos, content of each video (produced by client), subtitle language
3	Searchable activity log and display	Number of search results displayed per page
4	Internal messaging (private inbox between client and case worker)	Assignment of secondary worker(s), to share inboxes (e.g. if primary is on vacation)



5	Secure form upload (e.g. verification of hours)	Virtual document sharing, editing, signing, and storage
6	Online form completion	Number of forms and fields within each
7	Job Search (by geographical area, industry, position/role)	Default geography (local)
8	Online meeting	Support for web conferencing platforms such as Microsoft Teams, Zoom and GoToMeeting for:
		<ul style="list-style-type: none"> • Case management • Marketing and outreach • Mentoring • Hiring events
9	Request supportive services (pre-filled email templates for transportation, childcare, etc.)	Additional supportive services to be added to email templates (i.e. body and subject pre-filled with text related to supportive service in question)
10	Notifications	Which activities/actions trigger notifications, to whom are they sent (i.e. primary, secondary staff/worker)
	Reporting	
11	Utilization reports, i.e. time spent per activity (orientation videos, form entry, messaging)	Report platform (static reports vs interactive via Microsoft Power BI or SAP BI), delivery, refresh rate, format, rollup. All data captured will be owned by EMI.
12	Support requests	Same as above
	Management	
13	Account management (reset password, forgot password)	Additional fields other than name, email, case number and password
14	Role-based access (Administrator, Supervisor/Manager, Front-line Worker, Client)	Additional roles (e.g. Employer Administrator)
	Help and Support	
15	Client user guide	
16	Staff/worker user guide	
17	Context-dependent tips and instructions (within various site pages)	
18	Support request and tracking	Notification level, define escalation levels and sequence (workflow)
19	Virtual agent	Providing automatic customer service and support issues



	Language and Accessibility	
20	Multi-lingual support: English, Spanish, Mandarin, Russian	Up to 10 additional languages
21	Accessibility-compliant (WCAG 2.0 AA)	
	Consulting, Implementation and Integration	
22	Referral process (understand, document)	
23	Interface with ETO	Table(s) to reference or import to identify workers or clients (for referral validation)
24	Interface with other data sources	Spreadsheets to import

- Vendor must be able to customize the web-based site based on requests from Employ Milwaukee.
- Extensive experience working with TANF or WIOA programs preferred
- Vendor must provide consulting services to Employ Milwaukee on implementation approaches for client use of the web-based site. This consulting will be virtual if requested by EMI.
- Vendor must provide reporting tools to analyze data and create metrics for program evaluation.
- Vendor must provide automated report generation tools that use email. Reports should be customizable based on role, i.e. worker reports, supervisor reports, manager reports, etc.

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 RFP 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 RFP document as soon as they become aware of them. Any questions or requests for clarifications must be directed **in writing** to carlton.thompson@employmilwaukee.org no later than July 12, 2021 at 4 PM CST. The subject line of the email must be labeled “**RFP VIRTUAL SERVICE DELIVERY PLATFORM QUESTION.**” The only contact allowed with EMI staff is through carlton.thompson@employmilwaukee.org as stated above. **Unauthorized contact of any EMI employee is cause for rejection of the RFP 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 RFP	6/18/21
Deadline for Submission of Written Questions	7/12/21
Proposal Due Date	7/18/21
Proposal Review and Vendor Follow Up	8/1/21

3.3 Submission of the Response

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

carlton.thompson@employmilwaukee.org
ATTN: CARLTON THOMPSON, DIRECTOR OF IT AND FACILITIES
EMPLOY MILWAUKEE, INC.
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3.4 Evaluation Criteria

An EMI evaluation committee will be established to evaluate proposers’ responses to each of the RFP 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.	20%
System Description	Describe the system and product in comparison to the scope of services outlined in Section 1.2	40%
Proposer's Qualifications/Experience with Like Projects	Describe experience and qualifications providing similar products and services.	20%
Cost	Describe the full cost of software, implementation, and other services costs necessary to deliver the proposed solution.	20%



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 RFP.

TAB B: References, Specifications and Qualifications

Section 1: Vendor References (20%)

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: System Description (40%)

Present the details of your virtual service delivery platform and how it aligns with the specifications outlined in Section 1.2.

Section 3: Proposer's Qualifications /Experience with Like Projects (20%)

Describe your previous experience developing virtual service delivery platforms for workforce development programming and nonprofit or for-profit agencies and organizations.

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

You must fill out the Cost Proposal Worksheet (Exhibit A) with your pricing. 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 RFP. 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 include relevant and necessary information to demonstrate the service capacity described in TAB E.



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.