



**WRTP/BIG STEP
REQUEST FOR BID**

Strategic Planning Services

January 2017

TIMELINE

January 24, 2017	Release request for bids
February 18, 2017 By 5:00 PM CST	Proposal deadline: Proposals to be submitted via email to Matt Waltz at mwaltz@wrtp.org
Week of February 21, 2017	Select consultant
February 25, 2017	Notify applicants of decision
March 7, 2017	Execute contract
December 16, 2017	Complete process and provide final report

BID BACKGROUND

BID PURPOSE

WRTP/BIG STEP is seeking proposals from consultants/firms to help with the development of a comprehensive Strategic Plan. WRTP/BIG STEP anticipates that the planning process will take several months to provide adequate time for Board and member participation, some staff member input and review by key stakeholders. The outcome of the process will be a written strategic plan document that presents the planning process, the analysis, opportunities and strategies that will guide WRTP/BIG STEP for the next five years. **Please note that this bid requests the services of a consultant to:**

- **Provide recommendations to the overall strategic planning process**
- **Provide planning for and support for an organizational analysis**
- **Facilitate the strategic planning process**
- **Prepare summary report**

WRTP/BIG STEP encourages any inquiries with respect to the expectations and/or scope of work sought through this proposal by email to Leslie Spencer-Herrera: lspencer-herrera@wrtp.org .

Proposals received by 5:00 p.m. CDT on Friday, February 18, 2017 will receive full consideration.

ORGANIZATIONAL BACKGROUND/DESCRIPTION

The Wisconsin Regional Training Partnership/Building Industry Group Skilled Trades Employment Program (WRTP/BIG STEP) is a non-profit, 501(c)3 public interest organization that is devoted to family-sustaining jobs. The mission of WRTP/BIG STEP is to enhance the ability of private sector

organizations to recruit and develop a more diverse qualified workforce in construction, manufacturing and related sectors of the regional economy. We are “Industry Led, Worker Centered & Community Focused.” Over the past decade, our programs have placed more than 6,000 low-income, unemployed, and young job seekers into family-sustaining jobs, and promoted equal employment opportunities in the community. We are headquartered in Milwaukee, Wisconsin and have offices in Madison as well as St. Paul, Minnesota. We provide our services where our industry partners request them.

We make it a strategic priority to stay on top of industry trends and always target firms and industries that are able and willing to pay family-supporting wages. Currently we focus our efforts in the construction and industrial sectors. WRTP/BIG STEP is industry-driven, focusing first on the needs of regional employers to ensure workers are trained in the appropriate skill sets. WRTP/BIG STEP is able to build effective partnerships and efficiently use its resources to focus on providing training and placements only where there are good jobs. As compared to other non-profit workforce training organizations, we only provide training when we know there is a known job/career upon completion.

The key to the success of WRTP/BIG STEP is the outstanding leadership and staff of our organization. Our Board of Directors consists of industry representatives who provide the leadership and grounding in meeting our industries’ needs (Board Listing is found in Attachment A). Our diverse staff has extensive experience in the private sector, social services, and fiscal and program administration. The organization has sustained an average annual budget of roughly \$3.2 million with twenty-four full-time staff and twenty-seven part-time staff.

WRTP/BIG STEP connects low-income, unemployed, and underemployed individuals to a wide range of workforce development agencies, educational institutions and community partners. Upon assessing their skills and interests, individuals are referred to the BIG STEP Apprenticeship Readiness program for the construction trades and/or an array of training certificate programs, immediate employment opportunities, or remedial services, such as remedial education or driver’s license recovery.

Our services focus on

- **Apprenticeship Readiness:** individualized tutoring for potential apprentice candidates to help that individual improve his/her academic skills in preparation for the apprenticeship exams of their choice.
- **Training Certificate Programs:** pre-employment training certificate programs for a growing range of skilled trades and industries. Certificates are industry recognized and assist in employment. Examples include: First Aid/CPR/AED, OSHA10 - OSHA30, Lead Safe Renovator, Flaggers, Manufacturing Skills Standards Certification, Asbestos Awareness, Welding (various), CDL and others as determined by industry need.
- **Direct Placements:** working with our employer partners, link job-ready candidates to immediate employment opportunities and continue to work with them to develop careers.

In addition to its non-profit organization, we also have a for-profit, temporary employment company – Triada Employment Services, LLC. This subsidiary provides staffing services to businesses in Wisconsin seeking fully trained skilled employees as well as entry level candidates. Triada follows WRTP’s model

of providing business with employees trained in specific skill sets to meet employers' exact needs. In 2015, Triada provided employment to 240 individuals and 55 transitioned to permanent jobs.

Further information on WRTP/BIG STEP can be found on its website <http://www.wrtp.org/>.

STRATEGIC PLANNING ORGANIZATIONAL COMMITMENT

WRTP/BIG STEP's Board of Directors looks forward to and understands the need of preparing a Strategic Plan. The planning and implementation process of the Strategic Planning will be guided by the following individuals filling specific Board and organization roles and responsibilities:

- Sheila Cochran and Mike Fabishak, Board Co-Chairs
- Dawn Pratt, Board Secretary
- Anthony Rainey, Board Treasurer
- Mark Kessenich, President and CEO of WRTP/BIG STEP
- Matt Waltz, Director of Administration
- Wanda Liddell, Executive Administrator to the President
- Leslie Spencer-Herrera, Resource Development, Communication and Planning, and staff support to the Strategic Planning process

SCOPE

The consultant shall, at minimum, accomplish the following:

Planning Activity and Final Deliverable

Working with Initiative partners, the consultant will:

1. Design and execute a strategic vision and comprehensive planning process.
2. Develop an actionable three- to five-year strategic plan, including a projected budget for its implementation.
3. Develop recommendations regarding the plan's implementation and support structure.

Research

It is anticipated that these tasks will be accomplished through a combination of activities, such as:

- Focus groups, interviews, and/or any other method that will be useful in receiving partner and community input,
- Facilitated group meetings with partners to create consensus regarding a strategic vision and strategic plan (including goals, objectives, strategies, and tactics), and
- Review and present available data as well as any relevant research and best-practices.

ANTICIPATED PROCESS FOR STRATEGIC PLAN DEVELOPMENT

While the Initiative partners seek the consultant's recommendations regarding the best process to develop an actionable strategic plan, the partners envision the scope of work being conducted in stages.

Stage 1. Vision and key goals with Strategic Planning Committee

This stage includes consensus building among the Initiative partners to:

- a) create a ***process and plan for the strategic planning process*** that:
 - is clearly stated
 - is compelling
 - implementable

- b) identify ***six to ten key Initiative goals***.

Stage 2. Research - Needs assessment, gaps analysis, SWOT analysis, research, etc. This stage should produce the substantive documentation and solutions needed for informing the strategic planning process. Assistance will be provided by WRTP/BIG STEP staff.

Stage 3. Facilitated planning and goal setting

- c) Conduct facilitated sessions with Board members and other parties as identified in Stage 1.

Stage 4. Write the strategic plan

Utilizing information from the first three stages, this stage will include the development of an actionable Strategic Plan that will serve as the overall blueprint for the Initiative's work. This plan should include:

- An Executive Summary
- A comprehensive, detailed plan that identifies:
 - Shared vision
 - Goals
 - Objectives
 - Strategies
 - Tactics
 - Responsible Partners and their Roles
 - Measures
 - Outcomes

CONSULTANT QUALIFICATIONS

To accomplish the scope requested, the consultant will need to possess the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Knowledgeable of non-profits, prefer knowledge/experience in providing workforce services
- Experience at gathering and utilizing data to inform the strategic planning process.

PROPOSAL

Proposals must include the following:

A. General Information

The Initiative partners understand that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number and email address for each person engaged in scope activities. Further, if a consultant group or partnership of consultants is proposed, the proposal should indicate who will serve as the “point” person for the purposes of this project and the engagement.

B. Consultant Qualifications and Roles

The proposal must describe the consultant’s qualifications to conduct the scope of work activities, including his/her expertise, knowledge, and experience. Experience should include examples of conducting similar or related work (i.e., working with other collaborative or collective impact initiatives to create a strategic vision and strategic plan).

If a consultant group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each consultant will conduct as well as information about their level of expertise, knowledge and experience to conduct those specific activities.

C. Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant in order to complete the requested scope of work, including:

1. the specific activities to be conducted at each stage
2. a timeline for the activities at each stage
3. milestones and deliverables tied to those activities, and
4. a detailed budget for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables.

D. References

The proposal should include **three** references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual’s name, title, address, telephone number and email address.

E. Previous Work Product

The proposal should include at least two examples of written work similar to the scope of work requested within this RFP (e.g., strategic plan).

GENERAL APPLICATION INFORMATION

Inquiries and Point of Contact

All questions/inquiries regarding this RFP may be directed to Leslie Spencer-Herrera, lspencer-herrera@wrtp.org or 414-937-3633. Inquiries regarding both the organization and the strategic planning process are encouraged.

Proposal Submission

Applications must be submitted by email to Matt Waltz at mwaltz.org by 5:00 PM on February 18, 2017.

APPLICATION REVIEW CRITERIA

The proposals will be reviewed and evaluated based on the following criteria:

<p>Qualifications (35 Points)</p>	<ul style="list-style-type: none"> • The consultant has the qualifications needed to successfully complete the scope of work • The consultant has prior experience working on similar projects
<p>Scope of Proposal (35 Points)</p>	<ul style="list-style-type: none"> • The proposal demonstrates an understanding of the project objectives and desired results • The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan • The proposal illustrates the consultant’s ability to successfully execute the proposed approach • The proposal includes an appropriate process to interact with committee members and community stakeholders
<p>Work Plan (20 Points)</p>	<ul style="list-style-type: none"> • The proposal adequately details project activities and milestones or deliverables associated with each stage of the scope of work • The proposal includes a detailed timeline for each stage • The work can be completed within the project timeline
<p>Budget (10 Points)</p>	<ul style="list-style-type: none"> • The proposal includes a detailed budget for each stage of the scope of work • Proposed costs are reasonable • Proposed schedule of payments corresponds appropriately with tasks, milestones or deliverables

REFERENCE CHECKS

Information from references will be evaluated using the following criteria. The evaluation will be labeled as satisfactory or unsatisfactory.

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| <p>References
(Satisfactory/
Unsatisfactory)</p> | <ul style="list-style-type: none"> • The reference would hire the consultant again • The original Scope of Services was completed within the specified timeline • Interim deadlines were met in a timely manner • The consultant was responsive to the reference’s needs • The consultant anticipated problems and solved them quickly and effectively • The original Scope of Services was completed within the project budget |
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- Consultants may be asked to participate in an interview to further gauge their fit and ability to work on this project.
- Consultant selection will be based on the consultant’s written proposal and the results of the reference checks.