

WORKFORCE SOLUTIONS

G R E A T E R D A L L A S

Workforce Solutions Greater Dallas is an equal opportunity employer/program, and a proud partner of the American Job Center network. Auxiliary aids are available upon request, for persons with disabilities. TTY:214-745-1054. Funding received by the TWC and through the Departments of Labor, Health, Education and Agriculture. 100% of paid costs would be from Federal Funds. It is not anticipated that non-governmental funds will be involved.

September 24, 2020

Interested Organizations Request for Proposals (RFP) **PATHS for Texas Gateway**

Workforce Solutions Greater Dallas (WFSDallas) is a non-profit organization that administers and acts as fiscal agent for programs consolidated at the local level and is responsible and accountable for the management of all workforce development funds made available to the local workforce development area. WFSDallas administers contracts and activities with a budget of approximately \$160M annually. WFSDallas is a tax-exempt organization. Please see WFSDallas website (www.wfsdallas.com) to learn more about workforce programs, Board of Directors and other pertinent information.

Services Solicited

We are seeking proposals from qualified organizations to supply a commercial off-the-shelf software solution for a Learning Experience Platform (LXP) for PATHS for Texas Gateway.

The PATHS (Pursuit of Advanced Training in High Demand Skills) for Texas is a statewide initiative to leverage Texas' existing workforce development strengths in regional sector partnership to design and implement innovative practices that upskill incumbent and displaced workers in the retail sector, aid employee retention and propel individuals' career pathways within retail and/or into other sectors. The overarching goal of PATHS is to upskill retail workers to achieve advancement and promotional success, enhanced career progression and greater economic mobility. Success of the initiative will be measured by quantitative employment and wage data, as well as, qualitative methodologies focused on outcomes and changes to participants' and employers' perceptions. The initiative will address the labor market needs of the retail and service sector by partnering with regional workforce boards, employers and training providers.

The commercial off-the-shelf software solution solicited for the LXP for PATHS for Texas Gateway portal will be the mechanism for online services and training. The Gateway will serve as the front door for all online activity related to the project for employer, incumbent and dislocated worker program information; it will seamlessly direct participants to access training content and participating workforce boards' learning management services while providing data analytics and insight. The software solution for the LXP for PATHS for Texas Gateway must have functionality to accommodate up to 1,225 users.

The software solution system design for PATHS for Texas Gateway will provide a consumer-grade system composed of integrated technologies for enabling learning. The software solution will curate and aggregate content, create learning and career pathways, enable networking, enhance skill development, and track learning activities delivered via multiple channels and content partners. By delivering on a central platform, the software solution for the LXP will enable PATHS for Texas to provide an engaging and learning-rich experience.

achieving competitive solutions... for employers through quality people and for people through quality jobs.

Software Solution System Design

The proposed software solution system design will provide a learning experience platform for PATHS for Texas Gateway. The solution system design will meet the following functionalities/features at minimum and where applicable:

Unified Learner Experience

- a. A universal search across all content, all formats, all content providers, pathways, experts, and groups and both internal and external simultaneously.
- b. Filters available to search
- c. Personalization
- d. Platform leverages machine learning or other A1 tools
- e. Ability to pull in content from partner vendors, social sharing, and the world-wide web
- f. Offer learning targeted at skills gaps
- g. Offer learning embedded in everyday routines
- h. Relevant design based on current learning styles

System Capabilities for Learner experience

- a. Track and show learner history.
- b. Support social learning
- c. Support employee engagement effort
- d. Access internal, vendor, and external content
- e. Options for search within system
- f. Enrollment, recommended and required training

Multiple Languages Supporting Content and User Interface of the System

Individual Development Spending Accounts

- a. Allocate funds for individual spending accounts for learning related purchases
- b. Allow for personnel control on allocations
- c. Controls on allocated money not spent learner, or if learner leaves the organization.
- d. Funds tracked to inform the company about future learning investment decisions
- e. Management fees charged for the service

Robust User Functionality (i.e. administrator and manager functionality)

Enterprise Functionality

Content

- a. Content types available and accessible from your system (i.e., courses, articles, podcasts, etc.).
- b. Content sources available (i.e., TED, Penn Foster, Skillsoft).
- c. Content depth: (i.e., size of the available libraries.)
- d. Internal content:(i.e., internal systems you have integrated to simplify access (i.e., LMS, SharePoint).)
- e. Vendor content:(i.e., out-of-box integrations available from your system (i.e., Skillshare, Coursera, Penn Foster).)
- f. External content: (i.e. personnel can access external content.)

Group learning and social collaboration

- a. Levels or types of groups available.
- b. Features and functionality.
- c. Group members access internal, vendor and external content equally.

Curation and Learning Plans

Curation

- a. System will help curate content
- b. Personnel can add internal, vendor and external content to your system

- c. Process performed through a single user interface
- d. Any other information on curation relating to the system solution

Learning Plan

- a. Learning plans created to address specific learning experiences
- b. Content items in learning plans having a fixed order
- c. Individual learning objects in a plan marked complete
- d. Roles are permitted to create learning plans
- e. Learning plans created by system administrators and sent to employees
- f. Learning plans created by line manager/supervisor and sent to their direct reports
- g. Learning plans created by learners and shared with others
- h. Learning goals. (i.e., content can be assigned a goal date for completion)
- i. Required learning (i.e., required, or mandatory content can be located within your system)
- j. Talent and career development (i.e., support the individual and the enterprise when it comes to defining necessary skill and knowledge required for a current role and/or for future career development)

Credentials and Confirming Knowledge and Skills

- a. Options are available to support learner achievements like badges, certifications, etc.
- b. Previously awarded credentials and awards added to learner's profile

Extended Enterprise (if applicable)

- a. System Multi-Tenant (i.e. multiple portals)
- b. Tenants upload their own end users, content (if allowed by administrator)
- c. Data generated for each tenant viewable on Analytical Data/Reports screen (overall with drill down for each tenant)
- d. System gives the ability to skin/brand each tenant/portal
- e. System allows for multiple custom domains

Mobile Strategy

(Platform accessible via mobile devices; support native iOS, and Android operating systems; and provide user-friendly mobile experience)

Technical and Security

(Internet/cloud security standards on integration: Single Sign-on to content/systems from your platform; solution offers comprehensive integrations with LMS systems; solution offers comprehensive integrations with Human Resource Information System (HRIS); expected participation in technical integrations; and integration of new providers or systems during or after implementation; platform accessible via tablet devices; uptime exceeds industry standard)

Skills and Skill Measurement

- a. System links learning to skills to roles in our organization
- b. Effectively measure the progression of skills in your solution
- c. A universal skills measurement solution built into your platform
- d. Solution does a skills survey or skill check of our organization
- e. Ability to do career mapping
- f. Solution uses AI/data science to help create skill plans aligned to roles in our organization
- g. Capabilities for targeting development of future skills.
- h. Availability of taxonomy

Data and Insights

- a. Capture learner information in a configurable profile format
- b. Usage data on all formal and informal learning (i.e., courses, events, books, articles, videos, etc.)
- c. Levels of insights available (e.g., individual, group, enterprise)
- d. Create data about learning activity (i.e., completions, information, sources, etc.)

- e. Create data about learner capabilities (i.e., skills, behaviors, outcomes, etc.)
- f. Track learning that occurs inside of the corporate environment as well as learning that is occurring anywhere outside of the corporate environment
- g. Scheduled reports delivered to administrators. (i.e., process and type of data that is delivered to administrator)

Implementation and Support

- a. Project management and implementation tools and process utilized during implementation
- b. Customer support provided during and after implementation to ensure the success of the implementation
- c. Experienced team in dedicated roles of client success, implementation and engagement

Delivery Timeline Solicited/Penalty for Non-compliance with Timeline of Deliverables

The delivery and installation, beta testing and training on a proven software solution system design for LXP will occur within six (6) months of award date to the vendor selected to provide services/products. Failure to comply with these services timeline may result in a reduction to the price amount for the services/products.

Deadline for Proposals/Submission

The bid proposal must be officially received by staff to: procurement@wfsdallas.com **no later than 5 p.m. CDT on Monday, October 19, 2020.**

Dated Material: Proposals are due by 5:00 p.m. CDT on October 19, 2020. WFSDallas is not responsible for any technology issues. **No faxed proposal will be accepted.**

Bidders' Conference

There will be no bidders' conference. If you have any questions regarding this RFP, you may pose them to the e-mail link at: procurement@wfsdallas.com **by 12 Noon CDT on Tuesday, September 29, 2020.** The responses to questions will posted on our website at: <https://www.wfsdallas.com/doing-business> **on September 30, 2020.**

Funding

All funding is conditional upon the availability of grant funds.

Contract Type

Contracts executed because of this RFP process will be cost reimbursement unless a different type of contract is determined by the Board to be more advantageous. All contracts shall be contingent upon the receipt of sufficient funding from the Texas Workforce Commission. Negotiated contract amounts will be contingent upon funding received. Final contracts will also be subject to any changes in the legislation, regulations or policies promulgated by the funding source(s). The Board reserves the right to vary or change the terms of any contract executed as a result of this RFP, including funding levels, the scope of work, performance standards, and shortening or extending the contract period, as it deems necessary in the interest of the Board and its programs, pending availability of funds.

Contract Period

The anticipated contract period will begin **November 1, 2020 and end October 31, 2021; however, may begin earlier pending contract negotiations.** The contract may commence earlier if required and be extended for one or more years on an annual basis. The Board may extend the contract for up to three (3) additional one-year terms. The total terms of a contract to provide services/products shall not exceed four (4) years. The contractor may be required to provide an annual closeout by program for each year. Offers to extend contracts are at the sole discretion of the Board, based on satisfactory performance, compliance with contractual obligations, and other factors as determined by the Board. The Board reserves the right to terminate the contract annually or earlier based on contractor performance and compliance with contractual terms and conditions.

Open Records

Proposals submitted in response to this RFP are subject to the Texas Public Information Act, Government Code, Chapter 552.003, and may be disclosed to the public upon request. No documents relating to this procurement

will be presented or otherwise made available to any other person, agency, or organization until after the funding award. Any confidential, privileged, or proprietary information contained within a proposal must be clearly identified by the proposer in the proposal itself (each applicable page labeled). The aforementioned information will be kept confidential by WFSDallas to the extent permitted by State law.

Eligible Bidders

Vendors in good standing (i.e., not debarred from doing business with state, federal or local government) and able to meet the technical specifications for quality and other requirements of this procurement document are invited to respond.

Governing Provisions and Limitations

1. WFSDallas reserves the right to accept or reject any or all proposals received, to cancel and/or reissue this Request for Proposals in part or its entirety.
2. WFSDallas reserves the right to deem a proposal non-responsive or disqualify any bid proposal that, in its sole determination, does not comply with or conform to the terms, conditions, and/or requirements of this RFP.

Proposer Inquiry/Appeal Process

The Dallas County Local Workforce Development Board is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process, and has established the following process for handling appeals of any procurement decisions:

Step1. Request for Debriefing -- Bidders not selected by this procurement process may appeal the decision by submitting, within 10 days of the receipt of Board notification of the procurement decision, a written Request for Debriefing to obtain information on the procurement process and how their proposal or offer was received and ranked. The Board shall acknowledge receipt of the Request for Debriefing in writing within 10 days of receipt, along with the date and time of the scheduled briefing. The briefing shall be scheduled, as soon as possible, and no later than 10 days from the receipt of the Request for Debriefing. (NOTE: The Board extends the courtesy of offering a briefing to any bidder who is not selected for funding; the 10-day time frame must be adhered to only if a bidder is considering an appeal.)

Step2. Debriefing -- The purpose of the debriefing is to promote the exchange of information, explain the proposal evaluation system, and help unsuccessful bidders understand why they were not selected. Debriefings serve an important educational function for new proposers, which hopefully, will help them to improve the quality of any future proposals. Materials provided in the debriefing include a blank copy of the proposal scoring sheet used by readers, spread sheet of rankings provided to the Board of Directors, and a summary of proposal scores. (Bidders who are selected for contract negotiations are offered similar feedback during contract negotiations.) Board staff will meet with the appealing party and review (a) the proposal evaluation process or the criteria for selection of sealed bids under RFPs or IFBs, and (b) how the appealing party's proposal or bid was scored or ranked. Bidders can gain a better understanding of the procurement process and how to improve their bids or proposals, while staff gets direct feedback to help improve future procurements.

Step3. Written Notice of Appeal -- If, after the debriefing, the appealing party wishes to continue with the appeals process they must submit to the Board a Notice of Appeal. This written notice must clearly state that it is an appeal and identify (a) the funding decision being appealed (i.e. specific date of RFP or IFB, or the Board action); (b) the name, address, phone and fax number (if available) of the appealing party(ies); and (c) the grounds of the appeal. The Board President must receive the Notice of Appeal within 15 days of the date of the appealing party's debriefing, in Step 2, above.

The Notice of Appeal must be emailed to procurement@wfsdallas.com and addressed to:

Laurie Bouillion Larrea, President
Dallas County Local Workforce Development Board, Inc.
Ross Tower
500 N. Akard Street, Suite 3030
Dallas, Texas 75201

Written acknowledgment of receipt of the Notice of Appeal will be provided to the appealing party within five (5) working days of receipt of the Notice of Appeal. Such acknowledgment will include specific instructions for completing the appeals process and the date, time and place of the next step, The Informal Hearing.

Step4. Informal Hearing – Due to COVID19, an Informal Hearing will be held virtually within 10 days of receipt of the Notice of Appeal. The Hearings Officer will meet with the appealing party to discuss their concerns and the specific grounds of the appeal. The Hearings Officer may recommend to the Board President any appropriate actions, allowable under applicable rules and regulations and consistent with agency procurement policies, to resolve issues raised at the Informal Hearing. If the appealing party agrees, the appeal may be ended at this point.

Step5. Request for Formal Hearing -- The appealing party, if not satisfied with the results of the Informal Hearing, must inform the Hearings Officer, in writing, no later than five (5) working days from the date of the Informal Hearing of the intent to proceed with the appeal. Within ten (10) days of receipt of this written request, the Hearings Officer will respond, in writing, to inform the appealing party of the time, date, and place of Step 6, the Formal Hearing.

Step6. Formal Hearing -- The Formal Hearing shall be conducted within fifteen (15) days of the date of the Request for Formal Hearing. An independent hearing officer will conduct the Formal Hearing of the appeal. This hearing officer will consider the facts presented as grounds for the appeal and remedies requested. The hearing officer and staff or the appealing party may request additional information. After full review, the hearing officer will, at the next Board meeting, make its recommendation to the Board for final determination.

Step7. The Board Decision -- The Board will render a decision no later than 60 days from the date of the Written Notice of Appeal. The Board decision shall be the final decision and end the appeals process at the local level.

In all instances, information regarding the protest/dispute will be disclosed to TWC. TWC Financial Manual for Grants and Contracts, Chapter 14, provides for limited appeals of any Board decisions:

"The Commission shall accept no protest or dispute appeal until all administrative remedies at the contractor level have been exhausted. Commission appeal review is limited to:

- ◆ Violations of federal law and regulations, and procurement standards established by federal regulations,
- ◆ Violations of State or local law shall be under the jurisdiction of State or local authorities, and
- ◆ Violations of Board's protest/dispute procedures or failure to review a protest or dispute shall be referred to such authority as may have proper jurisdiction."

Selection Process

The selection of a vendor will be in accordance with the principles stated in the Board's plan and State plans, as well as other applicable laws, regulations, and policy issuances from Federal, State, and Local entities.

1. We will make an effort to utilize small, minority and female-owned operated businesses, as vendors, and to allow such organizations maximum feasible opportunity to compete for award.
2. We will award contract/purchase agreement only to "Responsible Bidder", i.e., a Bidder/Vendor who has demonstrated competence to deliver the specified goods and services, a proven record of business integrity and ethics, and the ability to meet the requirements of this Request.

3. WFSDallas reserves the right to contact any individual or agency listed in the proposal, or to contact others who may have knowledge of the bidder's relevant services/products or qualifications.
4. A response to this request does not commit the WFSDallas to award a purchase agreement or to pay any costs incurred in the preparation of a response, nor to pay for any other costs incurred prior to the execution of a formal purchase agreement unless such costs are specifically authorized in writing by the WFSDallas.
5. WFSDallas reserves the right to accept, or reject any or all proposals received, or to cancel in part or its entirety this Request for Proposals.
6. No contract/purchase agreement may be awarded until the bidder has complied with Executive Order 12549 29CFR, Par 98 by submitting to the WFSDallas a signed Certification of Debarment, which states that neither the vendor, nor any of its principals, are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in a procurement by any Federal department or agency.
7. Bidders shall not, under penalty of law, offer any gratuities, favors, or anything of monetary value to any officer, or employee of the Dallas County Local Workforce Development Board, Inc. or to any consultant, employee, or member of the Board for the purpose of or having the effect or influencing favorable disposition toward their own bid or any other bid submitted hereunder.
8. Bidders shall not engage in any activity that will restrict or eliminate competition. This does not preclude joint ventures or subcontracts.
9. In the interest of maximum, free and open competition, all Board members and Board staff will be precluded from providing technical assistance or answering questions concerning this RFP which might offer a competitive advantage to any bidder. Potential Bidders are asked to respect these conditions by not making personal requests for assistance.
10. Prior to award of any contract/purchase agreement, a Bidder must sign a "Certification Regarding Conflict of Interest" stating adherence to the Board policy regarding free and open competition and conflicts of interest.
11. The contents of a successful bid can become a contractual obligation, if selected for funding. Failure of the bidder to accept these obligations can result in cancellation of the award for contract/purchase agreement.
12. WFSDallas reserves the right to withdraw or reduce the amount of an award if there is misrepresentation of the bidder's ability to perform as stated in the bid.
13. WFSDallas reserves the right to request additional information from any and all bidders.
14. WFSDallas reserves the right to award a contract/purchase agreement to other than the lowest cost/priced bidder.
15. Proposals submitted in response to this RFP are subject to the Texas Public Information Act, Government Code, Chapter 552.003, and may be disclosed to the public upon request. No documents related to this procurement will be presented or otherwise made available to any other person, agency or organization until after the funding award. Any confidential, privileged or proprietary information contained within a proposal must be clearly identified by the proposer in the proposal itself (each applicable page labeled). The aforementioned information will be kept confidential by WFSDallas to the extent permitted by State law.

Proposal Evaluation Process

Responsive proposals submitted by the deadline will be evaluated using the objective criteria below. The Board assigns professional staff or qualified outside evaluators to read and evaluate each proposal. Parts of the scoring will be scored independently by each reader; the final scores for those parts will be the average of the independent scores of all readers. All references are validated, and scores included in the evaluation process. The Board may interview top scoring bidders before selecting a bidder for award of contract. In selecting proposals for award of contract, the Board reserves the right to depart from the strict ranking by evaluation scores, whenever it deems such departure will better serve the best interests of the Board and its constituents.

Selection Criteria for Award

The evaluation factors for the basis of awarding a contract/agreement include:

- **Demonstrated experience in providing and delivery of services/products** **25**
The bidder must demonstrate organizational capacity, effectiveness, and competency in delivering comparable or related services in the prior three years.
- **Services Solicited** **45**
The bidder must demonstrate a thorough understanding of services solicited.

The bidder must describe similar software solution that will comply with the services and functionalities/features at a minimum in Software Solutions System Design in the RFP. Additionally, the bidder should communicate a statement on ability to meet the RFP timeline for invoice and delivery of requested services/products.

- **Costs (Budget Summary)**

30

The WFSDallas is seeking services/products at the most competitive cost available, provided that the bidder can comply with all the limitations specified in this Request for Proposals. The bidder's bid will represent the total cost of services/products as prescribed in the RFP.

Proposal Preparation

Each proposal must contain the following information:

1. Proposal Cover Sheet (Attachment A)
All items on the Proposal Cover Sheet must be completed. Identify a liaison or primary contact person, as well as the Signatory Authority – a person with the legal authority to negotiate and sign a contract on behalf of the bidding entity.
2. Narrative (Attachment B)
 - a. Describe your organization (length of time in business, etc.) and record of providing services/products similar to those requested. In addition, provide qualifications and experience of staff who will be involved in implementing services and products to Board staff.
 - b. Provide sufficient information if applicable including, but not limited to, describing your software solution that allow for functionality similar to the information requested in **Software Solution System Design** of this RFP. In addition, the bidder should provide a statement of commitment to invoice and delivery timeline as noted in **Delivery Timeline Solicited/Penalty for Non-compliance with Timeline of Deliverables** of the RFP.
3. Cost (Budget Summary, Attachment C) –WFSDallas is seeking services/products at the most competitive cost available, provided that the bidder can comply with all the limitations specified in this Request for Proposals. Bidder's proposal will represent the total cost of services/products as prescribed in the RFP for WFSDallas.

Budget Summary Instructions:

- Delivery and implementation – Indicate cost for delivery and implementation of system to be provided.
 - Training WFSDallas Staff (one-time service) – If applicable, indicate cost for one-time training of WFSDallas staff.
 - One-Year Technical Support – If applicable, indicate cost for one year of technical support of system to be provided.
 - First Year License – If applicable, indicate cost for first year license (based on seats/users up to 1,225) for system to be provided.
 - License for Each Additional Year – indicate cost for license for system for up to two additional years for system to be provided.
 - Other – If applicable, indicate any other cost associated with system delivery and implementation not described as a cost item in the budget summary.
4. Budget Summary Back-up Sheet (Attachment D) – Please provide details and/or formula for each cost item that is listed in the Budget Summary Back-up Sheet.
 5. Certification of Bidder – Attachment E

6. Certification Regarding Debarment – Attachment F
7. Certification Regarding Conflict of Interest – Attachment G
8. Texas Corporate Franchise Tax Certification – Attachment H
9. List of Recent References
Please provide a list of three customers, with contact person and phone number, who are familiar with bidder's services/products. These should be active customers within the past two years. **This information should be submitted as Attachment I.**
10. Non-Discrimination
Please include a statement describing your agencies commitment to providing quality customer services and non-discrimination regarding hiring and employment opportunities as well as services/products to customers. If there are written policies in place regarding non-discrimination, you may attach a copy. **This information should be submitted as Attachment J.**