

**REQUEST FOR PROPOSAL**

**COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION  
Process Improvement Services  
RFP #05-3119**

**Issued  
June 11, 2019**

**Proposal must be received no later than  
July 8, 2019, 1:00p.m. CT**

**Community Relations – Social Development Commission  
1730 W. North Avenue  
Milwaukee, WI 53205  
Attn: Patrick Kirslenlohr  
pkirslenlohr@cr-sdc.org**

## **General Information**

The Community Relations-Social Development Commission (CR-SDC) of Milwaukee is seeking proposals for Process Improvement facilitation services for the Weatherization Program. The selected FACILITATOR will work with the Weatherization, Executive and Funder Staff, resulting in the development of a process improvement plan for the Weatherization program.

SDC is responsible for supplying or providing all necessary personnel, equipment, materials and supplies, to install allowable weatherization and energy conservation measures in eligible low-income households per the Wisconsin Weatherization Program Manual, and federal and state regulations.

Funder will be performing quarterly reviews and shall be performed based on production goals identified in the approved annual Weatherization Monthly Contract Plan. SDC shall make a good faith effort to attain a goal of a 40% rental production rate. Agencies shall comply with annual total budget expenditure requirements in section 5.3 (9) of the Wisconsin Weatherization Program Manual.

### **OBJECTIVES**

The Weatherization Process Improvement Initiative will achieve:

- ✓ Greater efficiency by reducing non-value added activities
- ✓ Improved internal and external customer satisfaction;
- ✓ Reduced wait times and process time;
- ✓ Reduced backlogs and bottlenecks;
- ✓ Reduced callback rate
- ✓ Established baselines and metrics to measure improvement and success;
- ✓ Verifiable cost reductions; and
- ✓ Improved morale, productivity, and skill sets of SDC employees

Proposals will be accepted until July 8, 2019, 1:00p.m. CT. Submittals relative to this Request for Proposal should be addressed to:

CR-SDC Purchasing Division  
1730 W. North Avenue  
Milwaukee, WI 53205  
**Process Improvement Services**  
RFP# 05-3119

**Written responses and all supporting materials must be submitted in one original plus seven (7) copies.**

## **SCOPE OF SERVICES**

The Community Relations-Social Development Commission (CR-SDC) secure the services of a skilled accredited facilitator for the purpose of facilitating process improvement for the SDC Weatherization Program. Support SDC to develop an effective labor management that will drive improved quality and service, better team member engagement and reduced time. Labor cost management support includes detailed workload measurement and analysis, internal and external productivity benchmarking and target setting, front-line management training and coaching, and targeted intervention projects to rapidly improve productivity performance through improved workload management and implementation of proactive day-to-day management practices.

## **DELIVERABLES**

The selected FACILITATOR will develop the following:

1. A Current State Map showing what the process looks like today, including in-depth analysis of value-added and non-value added activities in the process.
1. A Future State Map, including improvement activities and metrics to measure performance of the process;
2. A Gap analysis to identify action items and a timeline to move from the current state to the future state;
3. An A3 documenting the entire review process and including a listing of specific and measurable improvements (if applicable); and
4. A final presentation reviewing the event to be delivered to agency and state leadership.
5. Facilitating Lean Process Improvement – The half-day sessions may be completed over multiple weeks; the schedule will be determined by the FACILITATOR and SDC. No changes may be made to the schedule without consultation with SDC.

The selected vendor will be responsible for working with the FACILITATOR on the following:

1. Directly leading the training session of each event.
2. Establishing goals, objectives, and ground rules for the event.
3. Assisting the FACILITATOR with mapping for both current and future states.
4. Meeting with the FACILITATOR prior to each session to review how to approach the session, as needed.
5. Meeting with the FACILITATOR after each session to debrief and provide guidance on next steps, progress, etc. as needed.
6. Assisting in preparing a final A3 and report out presentation for each event.

## **TIMELINE**

The process improvement projects listed in this proposal will be completed no later than September 30, 2019.

## **SDC's RESPONSIBILITIES**

1. SDC will provide meeting space and dedicate sufficient employees for the event.
2. SDC will provide a facilitator team of one to two staff members to assist with the events and to conduct follow-up activities to close gaps after the conclusion of the event.

3. Use the A3 document to identify a problem statement, stakeholders, team members, and objectives for the event

**Experience Required:**

Typically requires 5 years of experience in project management and facilitation of large cross-functional team in business. Typically requires 3 years of experience in process improvement.

**Knowledge, Skills & Abilities Required:**

- Skills and demonstrated experience in providing consultation, developing, facilitating and leading process improvement large scale projects to achieve the organizations goals and objectives.
- Skills in prioritizing programs and projects based on changing needs, strategic initiatives, resource capacity and risk exposure.
- Demonstrated knowledge of problem-solving methodologies, continuous improvement methods, project management methods, and analytical tools and methodologies.
- Skills and demonstrated experience in establishing excellent collaborative working relationships and process improvement with individuals and teams at various levels and from various fields of expertise, including executive leadership, to achieve a shared vision, values and objectives.
- Strong facilitation and persuasion skills with ability to influence others.
- Ability to recognize issues / risks, identify alternatives, and delegate to leadership for resolution and risk mitigation.

**General Requirements of Proposal Content**

**Proposals should address the areas listed below. Respondents may supplement proposal narratives with additional material (such as brochures, promotional materials, letters of recommendation, sample materials, etc.).**

1. Please describe the process you prefer to follow in Process Improvement efforts. How do you ensure that all participants are fully engaged in the process? In your opinion, what distinguishes a successful Process Improvement process from an unsuccessful one, and how do you ensure that the process will be a successful one?
2. Please describe what you believe distinguishes an outstanding process improvement plan. What elements do you think must be included in a high quality process improvement? What in your approach to process improvement can assure SDC that the final product of its process improvement effort will align with your idea of an outstanding strategic plan?
3. Cost and basis for cost – Please list the total cost for the services you describe in your proposal. Provide the basis for your cost estimate (such as cost per hour of facilitation, cost per actual time spent on all activities, a flat fee, or other basis). Be sure to account for any expenses, such as mileage, if expenses are not included in your proposed fee. The cost basis may be used in negotiating the final contract amount with the successful proposer, so proposers are encouraged to provide as much detail as possible for their cost estimates.

**The firm or individual responding to this RFP must provide the following:**

1. Cover letter on firm letterhead indicating the name and title of the person(s) who are authorized to answer questions about the RFP response. The cover letter should be limited to one page in length and summarize the key elements of the proposal.
2. Statement of Qualification: This section must not exceed two (2) type written pages and should include relevant details about your educational background, experience, and applicable skill sets.
3. Evidence of substantial knowledge and experience in developing process improvement plans for local non-profit organizations. Please provide evidence of your past success in similar work. Examples of such evidence include copies of at least two (2) examples of adopted Process Improvement documents developed under your guidance from other organizations.
4. Evidence of substantial knowledge and experience in facilitating Process Improvement meetings and plans. What experience do you have leading Process Improvement processes similar to what SDC is proposing? Do you have experience working with organizations similar in size, scope, and mission to SDC?
5. At least three (3) professional letters of reference/recommendation. The references should include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.

**I. ELIGIBILITY REQUIREMENTS**

The Contract award will be made after successful negotiation of a final agreement with the respondent whose proposal is selected from all respondents with the implementation of services to follow. This RFP, however, does not indicate a commitment by the CR- SDC to award a contract to any successful respondent. The CR-SDC reserves the right to reject any and all proposals without cause and to end negotiations without cause. A selection is estimated to occur within approximately two days after receipt of proposals. The CR-SDC intends to evaluate the proposed services based upon the data presented in response to the RFP. The proposals will then be reviewed based on qualifications, specific experience, references, familiarity with the services, and compensation; and then will be rated according to which firm best meets the needs of the CR-SDC.

Applicants whose existing contracts with CR-SDC are not in good standing will **not** be considered for a contract. Agencies not eligible include those that have had a CR-SDC contract terminated for default; are currently debarred and/or have been issued a final determination by a City, State or Federal agency for performance of a criminal act, abridgement of human rights or illegal/fraudulent practices.

Those firms whose proposals most closely satisfy the needs and requirements of the CR-SDC may be required to attend an interview and discussion meeting with the CR-SDC staff on a date to be determined. Failure to attend this meeting, if selected, may give cause to have your proposal declared non-responsive and rejected, at the CR-SDC's discretion.

## **II. CONTRACT AWARD**

Under this Formal RFP, the contract period is estimated to begin upon execution of the signed agreement. The RFP will be reviewed by the CR-SDC on an individual basis. The CR- SDC reserves the right to terminate the contract at any time should the vendor not meet service and performance expectations.

## **III. CONTRACT SPECIFICATIONS**

A complete response to this Request for Proposal (RFP) must include answers and completion of all of the above and any attached questions and statements. Any CR-SDC signature to accept this proposal or enter into a relationship agreement will be subject to review by CR-SDC Legal Services. The appropriate and authorized CR-SDC signer(s) will not sign any documents until all CR-SDC potential legal reviews and concerns with the pending documents are resolved in writing

A contract will be issued to the successful bidder. The selected provider will be expected to meet performance objectives as determined by CR-SDC. Failure to perform can result in termination of the contract. CR-SDC will consider all of the following factors listed below, as well as the completeness and timeliness of responses addressed in the RFP in the evaluation of all proposals. Please include all of this requested information in your RFP response.

### **Additional Information**

**Letter of Intent** (Deadline: June 28, 2019 at 1:00p.m. CT)

To assist in the evaluation of potential Process Improvement Services, please provide the following information:

#### **Firm**

1. Firm name, address, and contact information including telephone number, fax number, and website address.
2. Names and titles of all principals of the firm (name, title, phone number).
3. Type of firm: individual, partnership, corporation, subsidiary, or government entity; and whether in good standing at the time of submitting the proposal.
4. Organizational structure of the firm, history, including number of years in existence, number and location of offices, and total number of employees.
5. Provide details of your firm's financial status and stability.

6. Discuss any impending changes in your firm that could impact the delivery of services.
7. What characteristics most distinguish your firm from your competitors? Summarize the benefits to our organization of engaging your firm.

**Other**

1. Are there any conflicts of interest between your firm and the Community Relations-Social Development Commission (CR-SDC)? If “yes” please elaborate.
2. Has your firm or anyone that will be working with the CR-SDC ever been cited by a professional or regulatory governing body for disciplinary reasons? If “yes” please elaborate.

**Please review the following important information prior to submission:**

➤ **Non-discrimination:** Any agency or organization providing services for CR-SDC agrees not to discriminate against any employee, client, or applicant for employment or services on the basis of age, race, religion, color, disability, physical condition, sex, national origin or ancestry, arrest or unrelated conviction record, sexual orientation, military/veteran status or military participation. This provision shall include, but not be limited to all employment situations and selection for services.

➤ **Insurance Requirements**

General Liability:	\$1,000,000.00/ Per Occurrence
	\$2,000,000.00/ Annual Aggregate
Personal Injury:	\$1,000,000.00/ Per Occurrence
Fire Legal Liability:	\$100,000.00/ Per Occurrence
Products Completed Operations:	\$1,000,000.00/ Per Occurrence
Medical Payments:	\$5,000.00/ Per Occurrence
Owned Auto Liability and or -	\$1,000,000.00
Non-Owned/Hire Auto Liability -	If Automobiles Utilized
Workers Compensation:	Statutory Employers Liability
(\$500/\$500/\$500)	
Professional Liability:	\$1,000,000.00/Annual Aggregate Per Specialty

**Community Relations-Social Development Commission is to be named additional insured on all liability coverage, evidenced via a certificate of insurance.**

**IV. INSTRUCTIONS**

**Cover Sheet**

The enclosed Cover Sheet is the first page of the application. Use that form or replicate the form ensuring all information is provided. A signature is required to qualify the applicant for consideration.

**Minority Certification (If applicable)**

\* CR-SDC intends to use EBE/DBE’S (Small, Minority and Women) vendors whenever practical, in accordance with the agency’s mission. CR-SDC will endeavor to bid to EBE/DBE’s whenever and wherever possible. Bids can possibly be awarded to these vendors if they come within 5% of the lowest bidder and if the quality of the service or goods supplied is of at least equal quality compared to the other vendors. EBE/DBE’s vendor must be certified to receive this 5% preference (the State of Wis., City of Milw.EBE. or Wis. Unified Certification Program). Certification documentation must be attached to all copies to qualify for points.

**V. IMPORTANT DATES**

Formal RFP Issued: Tuesday, June 11, 2019  
Deadline for Letter of Intent: June 28, 2019 1:00p.m. CT  
Deadline for Submitting Written Questions: June 28, 2019 1:00p.m. CT  
Proposal Submission Due Date: July 8, 2019, 1:00 p.m. CT  
Estimated Start Date: Monday, July 26<sup>th</sup>, 2019

Proposals must be received no later than July 8, 1:00p.m. CT. Proposals will not be accepted via-email or fax. Proposals will be opened on July 8, 2019, 1:05 p.m. CT. Late proposals will not be accepted. Please do not include material other than that requested. Additional materials may be discarded.

**VI. FOR ADDITIONAL INFORMATION OR CLARIFICATION**

All correspondence regarding this RFP must be conducted through e-mail with an e-mail confirmation of receipt of message, and must be received by 1:00 p.m. CT, June 28, 2019 with RFP# 05-3119 referenced.

Contact for information or clarification:

**Community Relations – Social Development Commission  
1730 W. North Avenue  
Milwaukee, WI 53205  
Attn: Patrick Kirslenlohr  
pkirslenlohr@cr-sdc.org**

If any updates to this RFP become available, interested parties will be notified by email.

**VII. BASIS FOR AWARD OF CONTRACT(S)**

A decision will be rendered by staff and management from the SDC. Decision factors will include, but are not limited to, budget, and ability to communicate appropriately with the Facilities Manager. Proposals will be judged on completeness of response and be numerically scored (see page nine (9) “Criteria Review”) and qualitatively assessed. In the event that

proposals receive similar scores after the assessment process, potential vendors may be required to meet with SDC staff for a brief interview to clarify various points-of-interest. Incomplete proposals will not be reviewed. Certified minority-owned and women vendors are strongly encouraged to apply. All applicants will be notified of the final decision. As a result of this Request for Proposal (RFP), the effective date of any individual or aggregate award(s) is projected to be July 26, 2019.

### **VIII. GRIEVANCE PROCEDURE**

Once a vendor has been selected pursuant to the agency's competitive proposals process, an unsuccessful applicant or bidder may raise any question, challenge, or appeal with respect to the selection process in the following manner:

1. Any complaint or challenge to the selection process must be communicated in writing to the CR-SDC Executive Department within three business days of the date that notice of selection/non-selection was received.
2. The CR-SDC Executive Office shall provide a written response to the complainant within five business days of receipt of the written complaint.
3. If after the review of the response described in step 2, above, the complainant remains unsatisfied with the process, the complainant may file a grievance with the Executive Committee of the Board of Commissioners. The grievance must be in writing, must clearly set forth the grounds or basis for the grievance, and must be filed within five business days after receipt of the response described in step 2, above. The Chairperson of the Executive Committee will review the grievance and may convene the Executive Committee to discuss the complaint. The Committee may consult with persons necessary to determine the following issues:
  - (a) Did the selection process violate any policy or procedure of the agency?
  - (b) Did the selection process violate any Federal, State, or local law?

The Chairperson shall communicate a written decision to the complainant within 30 calendar days of receiving the written grievance. The written decision of the Chairperson shall be final.

**Criteria Review**

***STATEMENT OF QUALIFICATIONS:***

<b>EVALUATION CRITERIA</b>	<b>POINTS</b>
<b>Firm Experience</b> Our evaluation will include an assessment of the history of your company, your experience as it relates to the requirements within this RFP, evidence of past performance, quality and relevance of past work, references, and related items	25
<b>Firm Expertise</b> Our evaluation will include an assessment of the qualifications and experience of your managerial team, staff, subcontractors, and related items.	25
<b>Rates</b> Effective and efficient delivery of quality services is demonstrated in relation to the rates. The rates are reasonable and appropriate.	20
<b>Familiarity with Social Development Commission and the Weatherization Program</b> Our evaluation will include our assessment of your understanding of our organization and the Weatherization Program and how you integrated this knowledge into your proposal	20

- 1) *Firm Experience (25 points)*
- 2) *Firm Expertise (25 points)*
- 3) *Rates (20 points)*
- 4) *Familiarity with Social Development Commission and the Weatherization Program (20 points)*

***Maximum 90 Points***

**REFERENCES /MINORITY-OWNED VENDOR**

- 1) References - The applicant has provided the names and contact information of five non-profit or government references where similar services have been rendered. (5 points)
- 2) Minority-Owned Vendor - The applicant is a certified minority-owned vendor. Certification documentation must be attached to proposal to qualify for points. (5 points)

***Maximum 10 Points***

• PROPOSAL CHECKLIST •

**Cover Sheet with signature:** Original and seven (7) copies. The cover sheet should be the first page of the proposal.

**Statement of Qualifications:** Exhibit A - Original and seven (7) copies. Not to exceed two (2) typewritten pages, single-spaced, 10-point font or larger and 1-inch margins on all sides.

**Examples of Process Improvement:** Provide at least two (2) examples of adopted Process Improvement documents developed under your guidance from other organizations.

**Letter of Intent:** Information provided on page 6 of RFP.

**References:** Three (3) professional letters of reference/recommendation. References must include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.

**Minority Vendor Certification** (if applicable): One (1) copy of certification documentation must be attached to original in order to qualify for bonus points.

**Mailing Envelope:** All materials should be sealed in one (1) envelope. All responses must have Process Improvement Services RFP#05-3119 printed on the front of the envelope and must be physically received by 1:00 p.m. on **July 5, 2019 (no faxes or emails will be accepted).**

**REQUEST FOR PROPOSAL #  
COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION  
Process Improvement Services**

**COVER SHEET**

**Organization Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

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

**Phone:** \_\_\_\_\_ **Ext:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Street Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Website:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Social Security or Federal ID Number:** \_\_\_\_\_

**Total Proposed Budget if applicable:** \_\_\_\_\_

**Certified Minority Vendor\*** YES \_\_\_\_\_ NO \_\_\_\_\_ **Certified EBE** YES \_\_\_ NO\_\_

**Certified Woman Vendor\*** YES \_\_\_\_\_ NO \_\_\_\_\_ **Certified DBE** YES \_\_\_ NO\_\_

**Certification documents attached** YES\_\_\_ NO\_\_\_\_\_

SDC intends to use EBE/DBE'S (Small, Minority and Women) vendors whenever practical, in accordance with the agency's mission. CR-SDC will endeavor to bid to EBE/DBE's whenever and wherever possible. Bids can possibly be awarded to these vendors if they come within 5% of the lowest bidder and if the quality of the service or goods supplied is of at least equal quality compared to the other vendors. EBE/DBE's vendor must be certified to receive this 5% preference (the State of Wis., City of Mil. EBE.or Wis. Unified Certification Program).

**Certification documentation must be attached to proposal to qualify for points.**

**Statement of Certification**

The proposed activities, qualifications, dates, availability of resources, staff, cost, and all statements made are true and correct.

**Authorization Name/Title:** \_\_\_\_\_ (Print)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature)

**Debarment and Suspension**

Signature below acknowledges vendor identified on application has not been suspended, debarred, declared ineligible, or voluntarily excluded from eligibility by any Federal department or agency.

**Vendor's Authorized Representative Signature and Title**

\_\_\_\_\_