

REQUEST FOR PROPOSAL (RFP)

For

**CONSULTANT FOR AMERICORPS  
ADVANTAGE RESOURCE GUIDE SUPPLEMENT**

**RFA# CV17-107**

November 2, 2017

State of California



1400 10<sup>th</sup> Street, 2<sup>nd</sup> Floor  
Sacramento, CA 95814

Written Proposals Due at the  
CaliforniaVolunteers Office  
No Later Than:

November 17, 2017 at 5pm

**FAXES and EMAIL WILL NOT BE ACCEPTED IN LIEU OF PROPOSALS**

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### Attachments to RFP

Exhibit 1 – Standard 204 Payee Data Record Form

Exhibit 2 – Standard 213 Agreement

## **BACKGROUND**

CaliforniaVolunteers is the state office responsible for promoting and supporting service and volunteering. Detailed information regarding CaliforniaVolunteers' mission and programming is available at [www.CaliforniaVolunteers.ca.gov](http://www.CaliforniaVolunteers.ca.gov).

CaliforniaVolunteers has received federal funding from the Corporation for National and Community Service for Training and Technical Assistance (TTA Investment Grant). The aim of this RFA is to secure a contractor to create a supplemental resource for the AmeriCorps Advantage Career Resource Guide.

## **PURPOSE OF THIS REQUEST FOR PROPOSAL**

CaliforniaVolunteers seeks to create a supplemental resource for The AmeriCorps Advantage Career Resource Guide. The Guide is a resource for AmeriCorps members that provides them with the skills and knowledge needed to best position themselves for their life after service. AmeriCorps is a national service program that provides opportunities for Americans each year to address state and community challenges through service and volunteer action.

An AmeriCorps member is an individual who meets the eligibility requirements and engages in results-driven community service through an approved national service position. AmeriCorps members are recruited, trained, supervised, and managed by the funded organization, and may receive a living allowance and other benefits while serving. The AmeriCorps program provides opportunities for Americans to make an ongoing intensive commitment to service, and be part of the effort to address community needs in education, public safety, health and the environment. While adults aged 18-99 can serve an AmeriCorps term, the majority of members fall into the 18-24 age group. They are often recent high school graduates or recent college graduates who are seeking guidance on career-related matters. Members frequently cite an AmeriCorps service term as an important step in their career decision process.

As part of their service, members are given a unique opportunity to gain skills in specific tasks related to their service, as well as topics related to leadership, citizenship and career development. To support this, AmeriCorps programs are required to have their members spend a significant number of hours on member development. CaliforniaVolunteers is committed to supporting all programs with excellent resources to ensure that their members finish their year of service as highly competent, capable individuals and that employers recognize the value of hiring dedicated, committed, skilled AmeriCorps alumni.

The AmeriCorps Advantage Career Resource Guide includes chapters devoted to exploring the member's passions and skills, understanding of how service fits into their overall career and life goals, job search skills and other supportive skills such as researching opportunities, letters of recommendation, and online branding. The Guide

also contains sections devoted to professionalism, conflict resolution and other important aspects of being a conscientious employee. The Guide is available upon request.

CaliforniaVolunteers sees a contractor to augment The AmeriCorps Advantage with a Program Manager's Facilitator's Guide to using The AmeriCorps Advantage. This 8-10 page accessory would accompany the Guide and act as a training resource for Program Managers and other grant personnel as they facilitate the use of the Guide with their Members. Components of this product include:

- Supporting Members throughout the year of service
- A timeline for using the Guide and incorporating the Guide into the training schedule for the year
- Suggestions and guidance on which activities are best facilitated and which may be self-directed
- Top Tips: Highlights and annotations for content and exercises that are particularly valuable to members
- Details about pertinent worksheets, exercises, apps and other items that may assist program managers with the training exercises
- Messaging for Program Managers as they emphasize Members' commitment to service as they are exploring career options after the end of their term
- Other relevant topics

CaliforniaVolunteers feels that a thorough knowledge of the AmeriCorps Advantage as well as the target audience is a critical requirement for the contractor chosen. With that in mind, as part of this effort, CaliforniaVolunteers would leverage the expertise of the consultant to determine future modes of content delivery and ideas for training and technical assistance for our portfolio of programs. The consultant may be asked to facilitate focus groups with programs as they refine the Facilitator's Guide, and may give some technical assistance to programs in the process of completing this project.

The required deliverables for this RFP are:

1. The Program Manager's Facilitator's Guide to using the AmeriCorps Advantage;
2. A summary report of ideas for training, technical assistance, and other possible modes of content delivery including a discussion of which topics in the Guide lend themselves to video and/or webinar delivery.
3. Conducting focus groups and soliciting program feedback throughout the creation of the Facilitator's Guide, which may include some training and technical assistance to programs.

All deliverables should incorporate multiple design elements including narrative content, interactive and self-paced activities, case studies, stories of success, helpful resources and descriptive graphics. The ideal applicant will have extensive knowledge of the AmeriCorps Advantage Career Resource Guide and can provide the most appropriate content for the AmeriCorps audience. CaliforniaVolunteers recognizes that an abundance of content already exists in this field. We are open to adapting quality content for this use, but we expect much of it will need to be created. We expect that the individual or organization hired to perform this effort will have general knowledge of copyright and intellectual property restrictions, and would properly seek permissions and cite sources appropriately.

It is critical that CaliforniaVolunteers own the content wholly, and have all rights and distribution of the intellectual property.

This RFA is being conducted under the policies & procedures developed by the Department of General Services as provided under Public Contract Code Section 12102 et seq. This RFA contains the instructions governing the requirements for a firm quotation to be submitted by interested bidders. The format that bid information is to be submitted and the material to be included therein follows. This RFA also addresses the requirements that bidders must meet to be eligible for consideration, as well as addressing bidders' responsibilities before and after installation.

## **SCOPE OF WORK**

**November 27, 2017 through June 30, 2018**

### **1) Content Development**

Development of the Program Manager's Facilitator's Guide to the AmeriCorps Advantage to include a thorough review of the Guide and development of training-oriented content to assist program staff as they lead members through the use of the Guide throughout their service term.

Preparation of a summary report of ideas for training, technical assistance, and other possible modes of content delivery including a discussion of which topics in the Guide lend themselves to video and/or webinar delivery.

Preparation and facilitation of up to three focus groups with AmeriCorps programs to solicit input and refine the design of the Guide, as well as providing training and technical assistance to these programs to inform the creation of the Guide.

### **2) Design**

Design of final package in collaboration with a graphics consultant to encompass interactive activities, assessments, useful graphics and overall layout of the project.

### **3) Format**

The final product should be in electronic form and should be formatted for reproduction in printed form or for electronic delivery. A training and presenters guide for program delivery should be included.

### **4) Communication**

Engage with CV at least one time per month during the project period (December 1, 2017-June 30, 2018) to provide progress updates and gather input and feedback on the direction of guide development.

### **5) Intellectual Property**

CaliforniaVolunteers owns the content wholly, and have all rights and distribution of the intellectual property.

### ***Project Timeline and Details***

<b>CONTENT</b>	<b>DUE DATE</b>
Selection of topics to include in Facilitator's Guide completed	December 2017
Survey of existing content completed and items chosen to include in resource guide	January 2018
Permissions for use of existing content secured	January 2018
Draft of original content prepared and reviewed with the field	February 2018 thru March 2018
Final Revisions completed	June 2018

### **CALIFORNIAVOLUNTEERS ROLES AND RESPONSIBILITIES**

- Provide administrative oversight
- Process invoices
- Participate as a strategic partner in project development
- Approve revisions and completed guide
- Coordinate summary reporting to federal funder

### **KEY ACTION DATES**

Listed below are the important actions and dates and times by which the actions must be taken or completed. If the State finds it necessary to change any of these dates, it will be accomplished via an addendum to this RFP.

<b><u>Event</u></b>	<b><u>Date</u></b>
RFA available to prospective Vendors	11/03/2017
Final Date for Proposal Submission	<b>11/17/2017 at 5pm</b>
Proposal Opening and Review	11/20/2017
Notice of Intent to Award	11/24/2017
Proposed Award Date	11/27/2017
Expected Project Start Date	11/27/2017

Expected start date is contingent upon CaliforniaVolunteers and Vendor agreement of final contract terms, and upon contract approval from the California Department of General Services (DGS).

### **COMPLETING AND SUBMITTING THE APPLICATION**

To simplify our review process, we ask that you comply with the format and content requirements detailed in this section. Resumes, samples of work, and letters of support are the only exceptions to this requirement. Proposals which are clear and succinct, and do not substitute length for substance, will be most favorably received.

Please submit three (3) copies of your proposal. Correlate major sections of your proposal with the proposal narrative instructions below:

**PROPOSAL NARRATIVE INSTRUCTIONS** [up to 10 double-spaced pages-12pt font]

**I. Project Design / Approach (45%):**

Provide the CaliforniaVolunteers application review panel with a project plan that demonstrates a well thought out strategy (what will be done and how) to develop and implement the AmeriCorps Advantage resource guide as described.

**II. Qualifications (30%)**

Clearly describe staff qualifications and expertise. The minimum qualifications for vendors are:

- 1) The Vendor must have been in existence a minimum of five years at the time of proposal submission and be well-versed in career development theory and have experience in providing career development services.
- 2) The Vendor must have sufficient qualifications to undertake this project, preferably a Master's Degree in Counseling with an emphasis in Career Counseling. Other desired qualifications include being a National Certified Counselor and/or Master Career Counselor. A specialization in Financial Literacy is desired but not required.
- 3) The Vendor must have demonstrated expertise in the development and delivery of curricula.
- 4) The preferred individual or organization selected will have the expertise necessary to act as curator, editor and trainer of all material created.

**III. Communication style (5%)**

Please provide 2 – 3 samples of past work that give evidence of quality and demonstrate an ability to clearly and concisely communicate concepts (include samples of webinar or training materials – webinars can be provided via weblink).

**IV. Project management (10%)**

Describe your staff's ability to effectively lead and manage the project.

**V. Cost (10%)**

Confirm your ability to deliver the Scope of Work at the level of funds available and agreement to bill for payments by including a complete Project Budget (page 9) as part of your proposal.

## **SELECTION PROCESS**

Written proposals, including budget estimates, are due (11/17/17 by 5pm). All eligible proposals will be reviewed to determine if they meet the format requirements specified in the RFP. Those that do will be submitted to an agency review panel that will evaluate and score each proposal independently using the criteria specified below.

<b>Project Design / Approach</b>
Proposes a comprehensive and cohesive approach to accomplish the scope of work (i.e., describes a streamlined and efficient approach for how the work will be done)
Proposes appropriate milestones, a reasonable timeline and schedule of deliverables to accomplish the work within the period of performance stated
Describes potential challenges to carrying out the proposed work plan and provides strategies to address those issues
Demonstrates experience working with AmeriCorps programs and in relevant focus areas
<b>Qualifications</b>
Demonstrates appropriate academic preparation and professional qualifications for the project
The ideal organization or individual's qualifications will match those stated above
Has no conflict of interest with the Commission or its AmeriCorps programs
<b>Communication style</b>
Demonstrates an ability to clearly and concisely communicate concepts to the AmeriCorps member audience as well as program directors and supervisors
Samples of prior reports or products are clear, organized, and readable
<b>Project management</b>
Demonstrates an ability to effectively lead and manage the project
Demonstrates willingness to engage program staff on a regular basis to provide progress updates and give input and feedback on the direction of their work
Demonstrates an ability to adhere to a project schedule and conduct work in a timely fashion
<b>Cost</b>
Staffing, materials and supplies, equipment, and travel costs are adequate and reasonable
Amount and distribution of staff hours are adequate and reasonable

The scores for each criterion, based on the above rubric are added to get a final proposal score. The proposal receiving the highest score will be awarded the contract. State Certified Small Businesses will get an additional 5 preference points. Each bidder will be notified thereafter. Notice of the contract award will be given to each contractor and will be posted for a period of 5 days at [www.CaliforniaVolunteers.org](http://www.CaliforniaVolunteers.org).

If a contractor feels that the competition or award did not follow State law, a protest may be filed in writing with CaliforniaVolunteers within 24-hour period (excluding Saturday, Sunday, and legal holidays) following the Notice to Award posting on (11/24/17) at the address stated previously. Within 5 days after filing the protest, the protesting contractor shall file with CaliforniaVolunteers a full and complete written statement specifying the grounds for the protest. The bidder/protester must provide relevant facts and evidence to support their claim

that includes citing pertinent laws, rules, regulations or procedures on which the protest is based. CV will stop any further action of the proposed contract award until resolution of the protest proposed award has occurred.

**PROJECT BUDGET**

<b>A. Personnel</b>	<b>Grant</b>
(Provide detailed description and cost basis. Use multiple budget lines as needed to provide adequate detail.)	
<b>Subtotal, Personnel</b>	<b>\$</b>
<b>B. Supplies</b>	
(Provide detailed description and cost basis. Use multiple budget lines as needed to provide adequate detail.)	
<b>Subtotal, Supplies</b>	<b>\$</b>
<b>C. Travel</b>	
(Provide detailed description and cost basis. Use multiple budget lines as needed to provide adequate detail.)	
<b>Subtotal, Travel</b>	<b>\$</b>
<b>D. Other Support Costs</b>	
(Provide detailed description and cost basis. Use multiple budget lines as needed to provide adequate detail.)	
<b>Subtotal, Other Support Costs</b>	<b>\$</b>
<b>TOTAL BUDGET</b>	<b>\$</b>



**CONSULTANT FOR AMERICORPS ADVANTAGE CONTRACT**

Applicant Name: \_\_\_\_\_

Applicant's Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_

Project Summary/Primary Services:

- Are you requesting the Small Business Preference?      Yes      No

Signature of individual authorized to enter into contracts:

*All statements are correct to the best of my knowledge and I understand that any material misstatements may cause this proposal to be rejected.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

**DEPARTMENT CONTACT**

The project Representatives during the term of this agreement will be:

State Agency: CaliforniaVolunteers	Contractor:
Name: Kari MacDonald	Name:
Phone: (916) 319-9126	Phone:
Email: kari.macdonald@cv.ca.gov	Email:

Direct all inquiries to:

State Agency: CaliforniaVolunteers	Contractor:
Section/Unit: Finance and Admin	Section/Unit:
Attention: Kari MacDonald	Attention:
Address: 1400 10th Street, 2 <sup>ND</sup> Floor, Sacramento, CA 95814	Address:
Phone: (916) 319-9126	Phone:
Fax: (916) 445-8317	Fax:

AGREEMENT NUMBER

**CV17-107**

REGISTRATION NUMBER

1. This Agreement is entered into between the State Agency and the Contractor named below:

STATE AGENCY'S NAME

**OPR / California Volunteers**

CONTRACTOR'S NAME

2. The term of this Agreement is: **Upon signed execution** through **June 30, 2018**

3. The maximum amount of this Agreement is:

4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

Exhibit A – Scope of Work	Page(s)
Exhibit B – Payment Provisions and Budget Detail	Page(s)
Exhibit C* – General Terms and Conditions <a href="http://www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx">http://www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx</a>	GTC 610 (online)
Exhibit D – Special Terms and Conditions	CNCS (online)

*Items shown with an Asterisk (\*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at [www.ols.dgs.ca.gov/Standard+Language](http://www.ols.dgs.ca.gov/Standard+Language)*

**IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.**

**CONTRACTOR**

CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.)

BY (Authorized Signature)

DATE SIGNED(Do not type)



PRINTED NAME AND TITLE OF PERSON SIGNING

ADDRESS

**STATE OF CALIFORNIA**

AGENCY NAME

**CaliforniaVolunteers**

BY (Authorized Signature)

DATE SIGNED(Do not type)



PRINTED NAME AND TITLE OF PERSON SIGNING

**Karen Baker, Chief Service Officer**

ADDRESS

**1400 10<sup>th</sup> Street, Sacramento, CA 95814**

**California Department of General Services Use Only**

Exempt per: PCC 10335(a)



**PAYEE DATA RECORD**

STD. 204 (Rev. 6-2003) (REVERSE)

1	<p><b><u>Requirement to Complete Payee Data Record, STD. 204</u></b></p> <p>A completed Payee Data Record, STD. 204, is required for payments to all non-governmental entities and will be kept on file at each State agency. Since each State agency with which you do business must have a separate STD. 204 on file, it is possible for a payee to receive this form from various State agencies.</p> <p>Payees who do not wish to complete the STD. 204 may elect to not do business with the State. If the payee does not complete the STD. 204 and the required payee data is not otherwise provided, payment may be reduced for federal backup withholding and nonresident State income tax withholding. Amounts reported on Information Returns (1099) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.</p>								
2	<p>Enter the payee's legal business name. Sole proprietorships must also include the owner's full name. An individual must list his/her full name. The mailing address should be the address at which the payee chooses to receive correspondence. Do not enter payment address or lock box information here.</p>								
3	<p>Check the box that corresponds to the payee business type. Check only one box. Corporations must check the box that identifies the type of corporation. The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State provide their Taxpayer Identification Number (TIN). The TIN is required by the California Revenue and Taxation Code Section 18646 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a).</p> <p>The TIN for individuals and sole proprietorships is the Social Security Number (SSN). Only partnerships, estates, trusts, and corporations will enter their Federal Employer Identification Number (FEIN).</p>								
4	<p><b><u>Are you a California resident or nonresident?</u></b></p> <p>A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.</p> <p>A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.</p> <p>For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.</p> <p>Payments to all nonresidents may be subject to withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.</p> <p>For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below:</p> <table border="0"> <tr> <td>Withholding Services and Compliance Section:</td> <td>1-888-792-4900</td> <td>E-mail address:</td> <td>wscs.gen@ftb.ca.gov</td> </tr> <tr> <td>For hearing impaired with TDD, call:</td> <td>1-800-822-6268</td> <td>Website:</td> <td>www.ftb.ca.gov</td> </tr> </table>	Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov	For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov
Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov						
For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov						
5	<p>Provide the name, title, signature, and telephone number of the individual completing this form. Provide the date the form was completed.</p>								
6	<p>This section must be completed by the State agency requesting the STD. 204.</p>								
	<p><b><u>Privacy Statement</u></b></p> <p>Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.</p> <p>It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes noncompliance penalties of up to \$20,000.</p> <p>You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the State agency(ies) with which you transact that business.</p> <p>All questions should be referred to the requesting State agency listed on the bottom front of this form.</p>								