

New Mexico Trains
Request for Proposals

Demonstration Project
Beginning
January, 2003

The New Mexico Telecommunications and Call Center Training Consortium was formed in 2001 to provide New Mexicans with the skills necessary to secure telecommunications, technology, and call center jobs. Initial funding has been provided by a grant from the Employment and Training Administration of the US Department of Labor. As a condition of the grant, the Consortium has committed to work with industry to provide assessment and training and secure placements for 3,000 New Mexicans.

The Consortium has identified opportunities for a significant portion of those jobs within existing call centers that are currently in expansion mode within the state and are seeking qualified applicants. Those opportunities currently exist in the cities of Taos, Las Vegas, Grants, Carlsbad and Silver City. Call center operations are currently conducted in those cities by Penncro, The Connection, and Stream International.

The Consortium is requesting proposals by qualified applicants to provide services to include project oversight, community needs analysis, intake/assessment, outreach, curriculum development, training, online assessment and learning services, coaching/mentoring, and data gathering and support in the targeted communities listed above. Based on satisfactory performance as evaluated by NM Trains of the provider or providers selected, the Consortium reserves the right to expand similar services statewide through negotiated contracts with the providers.

Provided below is (1) the abstract outlining the Consortium's efforts, (2) global objectives critical to the project's success, (3) scope of work to be performed by project component, and (4) scoring criteria.

Due to the broadness in scope of the activities requested pursuant to this RFP, bidders are encouraged to respond to their strengths. Partnerships among entities whose strengths are complementary in addressing the objectives of the RFP are encouraged. In addition, bidders may elect to provide all services in all target cities, some services for all cities, or all services for a select city. The Board of the Consortium reserves the right to negotiate terms and select all or a portion of any bidder's offer.

ABSTRACT

New Mexico Trains, the New Mexico Telecommunications and Call Center Training Consortium, was formalized in November, 2000, to develop and coordinate training initiatives for the call center, telecommunications and technology industries. Its vision is to provide new workforce skills, career advancement opportunities, and a stronger economy in rural New Mexico.

Consistent with that vision is the realization that where current career path development tends to provide skills for entry level jobs and limited growth opportunities for the individual, the ideal path will provide additional training, career counseling, and long term mentoring to equip the individual for high skilled jobs with better wages and benefits. Those high skilled jobs have been identified by New Mexico Trains as currently existing or projected in 4 key job categories:

Telecommunications: call center reps, telecom technicians, and network technicians.
Technology: information services technicians and network engineers.
Multi media: technical artists and specialized developers.
E-commerce: programmers, designers, and project managers.

New Mexico Trains has identified specific gaps in the current training continuum in New Mexico in both content and delivery. Opportunities to address gaps in content have been identified through employer needs assessments for more accurate skills assessment and development of minimum employability skills and core competencies. Opportunities have been identified in delivery by developing 3 venues: community based, instructor led training; online assessment and learning modules; and a highly skilled mobile implementation team. Key to the success of all 3 venues is access to long term mentoring and job coaching designed to insure the individual's success.

New Mexico Trains is organized as a 501.c.3 educational non-profit corporation. The Board of Directors includes representatives from telecommunications, education, and the call center industry. The Board has identified the following organizational objectives: 80% rural focus, with 60 % of its resources directed toward call center activities and 40% toward more technical training. Special emphasis is on innovative training through online training modules, distance learning, and community based workshops. The consortium will utilize a staff of four: executive director, field director, economic data specialist, and administrative assistant. Staff will be complemented by contractors with expertise in training and job coaching. Timeline for the project is January, 2002, through September, 2004.

The consortium has established the following objectives: 3,000 skilled rural New Mexicans; a continuous flow of skilled workers for available jobs; new applications of technology for ongoing learning opportunities; and a new system of long term career counseling and mentoring.

Initial steps in deploying this initiative, to be achieved in the project's first 6 months, include:

1. Create a jobs / available worker overlay map to assist in identifying targeted communities.
2. Develop a jobs forecast by industry in targeted communities and regions.
3. Review available generic and industry specific assessment tools.
4. Create minimum employability standards through employer specific needs analyses.
5. Identify necessary training components.
6. Identify career counseling and mentoring resources.
7. Develop a plan for deployment of services in statewide and targeted one-stop shops.

New Mexico Trains is assembling a strong statewide coordinated effort and is developing memorandums of agreement with regional workforce development resources (boards and one-stop shops), educational providers, and employers. An MOA with the New Mexico Department of Labor has already been signed for work on a related project. Coordination and leveraging of existing resources will enable New Mexico Trains to share critical data and resources necessary for joint success, will eliminate duplication of effort, and will insure the initiative's ability to get participating workers on a meaningful career track.

GLOBAL OBJECTIVES

Proposals must acknowledge the project's global objectives as described below:

The objectives of the New Mexico Trains Board are to:

A. Establish and manage a program that will:

- Work to create at least 3000 new jobs for Rural New Mexico;
- Establish a governance system that will sustain these jobs in their respective communities
- Build a "knowledge network" that will add value to multiple current and future employers
- Create a "brand" for New Mexico as an attractive place to grow a business

- B. Support the overall economic development of the State
- C. Provide a framework commensurate with community business needs:
 - Support and build state-of-the-art technology
 - Connect employers with educational providers
 - Connect employers with proficient and available workers

SCOPE OF WORK

Due to the broadness in scope of the activities requested pursuant to this RFP, bidders are encouraged to respond to their strengths. Partnerships among entities whose strengths are complementary in addressing the objectives of the RFP are encouraged. In addition, bidders may elect to provide all services in all target cities, some services for all cities, or all services for a select city. The Board of the Consortium reserves the right to negotiate terms and select all or a portion of any bidder's offer.

PROJECT OVERSIGHT:

The successful bidder will be responsible for the general oversight and coordination of all project activities and components of the demonstration project. While the Consortium staff will be available to provide administrative services and coordination with the Consortium board, regional workforce development boards, one stop career centers, and US Department of Labor Employment/Training Administration representatives, it will be critical for the successful bidder to provide coordination of various project components with the one stop centers and their workforce boards as well as a link to the employing call centers and their corporate representatives.

COMMUNITY NEEDS ANALYSIS – Complete within 60 days of contract signing:

Target communities will have a comprehensive call center and other technology needs analysis completed in order to design and implement the various elements of the project. The successful bidder will insure that needs analysis to be performed in each community includes:

1. Specific skills required for entry into the targeted job opportunities.
2. A quantitative and qualitative profile of the skill level of the targeted community's workforce including basic academics skills, employability skills and specific job-related abilities.
3. An inventory of community resources that can be integrated into program design. An example would be any proven training programs offered by a community college.
4. A list of potential technology related employment opportunities for targeting.
5. A plan for other ongoing labor analysis and labor data gathering, market analysis, network analysis and identification of barriers to employment

OUTREACH – Implement within 30 days of contract signing / complete within 270 days:

The outreach component includes three major activities: building awareness in the community about the call center industry, recruiting a workforce to job opportunities, and providing information to the industry and prospective employers about the community's ability to meet their hiring needs. It will be necessary for the project's outreach activities to create community and employer/employee awareness "in-state" and industry awareness both "in-state" and "out-of-state". The successful bidder will insure that specific activities include:

- Branding New Mexico Trains (the New Mexico Telecommunications and Call Center Training Consortium)
- Educating the targeted community on the call center industry
- Educating the local workforce about job opportunities, job benefits and career advancement opportunities at specified employer location
- Partnering with employers to identify and disseminate specific company needs.
- Utilizing all available mediums for communication (possibly using more than one for any given community) to include:
 - a. Information sessions
 - b. Workshops
 - c. Job Fairs
 - d. Radio
 - e. Television
 - f. Print media
 - g. Direct mail
 - h. Web-site

INTAKE AND ASSESSMENT - Implement within 30 days / complete within 270 days:

Services provided in this key project component include the process of assessing, referring and tracking all participants in the program. A critical component of the project's ultimate success will be to insure that applicants provided with training services are in fact eligible for those services and that the candidates for training are properly matched with jobs appropriate to their abilities and interest. The successful bidder will provide intake and assessment services for up to 1,500 eligible individuals. Materials and procedures developed during a pilot project will be made available for incorporation if desired. Anticipated numbers of individuals by community are: Silver City – 375; Carlsbad – 350; Grants – 225; Las Vegas – 350; Taos – 200. The successful bidder will insure that services include:

1. Conduct intake services and establish the individual's eligibility.
2. Assessments:
 - Evaluate skills of targeted individuals for potential placement in the targeted call centers in order to create the *Individual Learning Map*.
 - Industry specific assessments will occur at the employer location or other appropriate sites.
 - Cut off scores for assessments will be identified and implemented.
 - Work with employers on validation of minimum acceptable employment skills.
 - Assessment tools may be specified by NM Trains.
 - All assessment tools will be web enabled and/or computer CD Rom based.
 - All assessment tools must be web enabled within 6 months of the contract start date.
3. Referrals:
 - Individuals identified as eligible and provided with assessment services will be immediately provided with a Job Coach for development of the Individual Learning Map.
 - The local coordinator of Job Coach services will track individual and set initial appointments with a Coach.
 - Coordinator will work the employer's HR department to identify eligible applicants under grant criteria that were not referred by the local "One-stop Center".
4. Tracking and data collection:

- Information will be collected on each participant in the program as required by the Consortium.
 - Contractor will provide data input into NM Trains specified data management systems.
5. Intake:
- Job Coach coordinators in each targeted community will work closely with and/or assume the role of local Intake Coordinators depending on workload.

CURRICULUM DESIGN – Complete within 45 days, subject to modifications and updates requested by the respective employer through the life of the demonstration project:

The creation of a sustainable training program will focus on building the skills required for success in a call center job. The selection and/or development of a successful curriculum will be dependent on the willingness and ability of the targeted call centers to deploy and implement the chosen curriculum. It must be a tool that can and will be integrated into the internal training activities of the call center. The successful bidder will establish the methodology to provide and/or develop a call center curriculum that includes the following:

1. Standard key elements:
 - Individual pre and post assessment for call centers
 - Call center industry overview
 - Employability skills training for call centers
 - Job specific skill building for call centers
2. Customized:
 - Curriculum designers will partner with employer to define the content of the program.
 - Duration of the training program will be defined with the employer.
3. Remedial Training:
 - If a dislocated worker has been tracked for a call center job but does not meet the basic requirements for employment, support will be provided for that individual to enable him/her to reach basic employability standards.
 - Proven programs that already exist should be utilized and integrated into the design of the program when appropriate.
4. Tracking:
 - A follow-up program and schedule will be defined so that key learning objectives are continually emphasized.
 - Skill growth will be evaluated over time.
 - Trainer evaluations will be conducted to monitor the effectiveness of the program

TRAINING SERVICES – Implement within 45 days / complete within 270 days:

Flexibility and a community-based focus are important to the delivery of the curriculum. The successful bidder will design and provide the following training for approximately 700 individuals, with the following numbers anticipated: Silver City – 200; Carlsbad – 165; Grants – 70; Las Vegas – 165; Taos – 100.

1. Live classroom:
 - Training will be delivered at local educational institutions, on-site at the employer's location, or at other appropriate locations at the employer's discretion.

2. Instructor Training:

- Instructors will be trained to facilitate the training program on an on-going basis.
- Employers may select appropriate instructors from their staff to be trained to deliver the curriculum.
- Trainers will be selected in-house, from the local Community College, or other appropriate resources to be trained to deliver the curriculum.
- Call center partners reserve the right to monitor all training and delivery of programs.

3. Contractor led:

- The Contractor will be responsible for oversight and monitoring of the training program on an on-going basis.
- Call center partners reserve the right to monitor all training and delivery of programs.

ONLINE ASSESSMENT AND LEARNING SERVICES – Complete within 180 days:

The successful bidder will insure that:

- All assessment tools will be web-enabled within 6 months of the contract start date to make the intake process more manageable.
- Core employability skills curriculum and any other educational programming will be made available as an online learning module within 6 months of the contract start date subject to approval by the participating employers.

In addition, a strong on-line resource will be established to provide and support all outreach services in the targeted communities.

JOB COACHING AND MENTORING SERVICES – Implemented within 30 days / completed within 270 days:

Each participant of the program will be assigned a Job Coach to guide and support the participant's progression through the program. The successful bidder will insure that Job Coach functions include:

1. Community-based:

- Job Coaches will be hired locally whenever available.
- Job Coaches must be placed at the employer location and the local "one-stop" shop in each targeted community.

2. Individual Learning Map (ILM):

- It is the responsibility of the job coach to work with the trainee to develop an Individual Learning Map.
- Used by both trainee and Job Coach as a progress chart to show completion of individual competencies and key milestones in training.
- The ILM continues through the employment of the individual.

3. Employability skills:

- Job Coach will be active in the employability skills progress of the individual.
- Each individual will have frequent access to Job Coach to discuss any employer issues.

DATA GATHERING – Implement within 90 days / complete within 270 days:

The successful bidder will be responsible for working closely with the Consortium to create a system that collects a database of information to measure the effectiveness of the program and to assist the local economic development agencies in their recruitment efforts. The system will include:

1. Participant intake information
2. Assessment results
3. ILM milestones
4. Community profiles
5. Job forecasts
6. Retention data
7. Community labor conditions
8. And any other data determined by the Consortium to be needed.

*Once program goals, personnel goals and contractor goals are identified the database will be set-up to collect pertinent data that will quantify those performance measures

EVALUATION CRITERIA

The Consortium Board will evaluate proposals on the weighted criteria listed below. Interviews may be conducted with the top offeror(s). Information and / or factors gathered during interviews, negotiations, and any reference checks in addition to the evaluation criteria rankings, shall be utilized in the final award decisions. References may or may not be contacted at the discretion of New Mexico Trains. NMT reserves the right to contact references other than, and in addition to, those furnished by the offeror.

Submitted proposals will be evaluated using the following criteria:

- Responsiveness to the Request for Proposals, and accordance with NMT requirements (25 pts)
- Bidders' qualifications and experience in providing the requested services (15 pts)
- Bidders' qualifications and experience in providing services to the target population (15 pts)
- Documented performance in other, similar programs (10 pts)
- Geographic accessibility to the target population (10 pts)
- Reasonableness of cost, and cost effectiveness (budgets may be reviewed independently from other materials) (25 pts)

The proposal must conform to USDOL ETA federal procurement regulations and include a statement agreeing to adhere to all mandatory federal contract certifications clauses. In addition, proposals must include clauses concerning the following items:

- The successful bidder will be required to submit periodic progress reports, time reports, and cost reports to the Executive Director.
- Exact dates of milestones and dates when deliverables are due relative to the date that the contract is signed will be negotiated.
- Understanding that this is a performance based contract and acceptance of deliverables will be based upon contract specifications
- Any mechanisms, methodology, or intellectual property developed as part and parcel of this proposal remain the property of the New Mexico Telecommunications and Call Center Training Consortium.
- All aspects of training including: the curriculum, personnel entitled to attend, schedule of classes, location of training, and identification of training personnel will be subject to approval of the Consortium.

- The successful bidder must provide certification that the contractor personnel identified in the response to the Request for Proposal are the persons actually assigned to the project, and a provision that the Executive Director approve any additions, deletions, or changes in contractor personnel in advance.
- The successful bidder must insure that a performance bond is obtained, or damages be assessed, for failure to adhere to the terms and conditions of the contract, or must provide proof of fiscal ability to complete the work and deliverables agreed to in any contracts with NM Trains.
- The successful bidder must certify that the system's response times, in live operations, are within contract specification, or the vendor is responsible for all upgrades to meet specifications.
- Payments will be made in line with performance based accomplishments.
- The Consortium may, at its discretion, retain at least 10% of the agreed upon fee from each milestone until final acceptance of the system.
- The successful bidder must meet specifications of all acceptance tests required by the Consortium.
- Bidder's system and or service warranty begins with the date of acceptance of the system.
- The Consortium will provide a not-to-exceed price for the contract.
- Project start-up will occur within 30 days of contract signing and meet the individual category implementation and completion dates specified.

PROPOSAL SUBMISSION AND PROCUREMENT PROCESS

PROPOSAL SPECIFICATIONS

Proposals are to be delivered as two separate but coordinated pieces – Part 1, the proposal and supporting documentation and Part 2, the projected budget for the proposed work. The NM Trains Board will review these components. Thus, it is imperative to provide all details as requested in the Design Guidelines found below in this RFP.

Parts 1 and 2 may be delivered to NMT in the same packaging but the parts should be distinctly and obviously separated. An electronic copy in Microsoft Office format is required for both Parts 1 and 2, but not for supporting materials.

Proposals for Part 1 should be typewritten, double-spaced, in 12-point font, securely bound, and may not exceed fifty (50) pages exclusive of cover pages and supplemental materials. Cover pages are defined as any page that serves exclusively to indicate the beginning of a new section. Relevant attachments, exhibits, or samples supporting your proposal may also be provided and will not be counted in the page limit constraint. All attachments, exhibits, or samples should be included at the back of the proposal behind a cover labeled "Supplemental Materials." Supplemental materials will be treated as supporting information to the proposal. However, the proposal should be able to stand-alone were these attachments excluded.

Part 2 should be comprised of a budget narrative and supporting budget data (see below). The budget narrative should be typewritten, double-spaced, in 12-point font, securely bound, and may not exceed five (5) pages exclusive of cover pages and supplemental materials. The proposed budget should be provided in the format of the template included with this RFP. An electronic version of this spreadsheet (in MS Excel) is available on request. Electronic versions can be included as support materials. Any electronic versions must

be in MS Excel and provided on a 3.5" floppy disk. However, a hardcopy version of the template MUST be included as a component of part 2.

Funds Available

Category	Amount Available
Project Oversight	\$ 80,000-\$100,000
Needs analysis	\$ 72,000-\$ 90,000
Outreach	\$125,000-\$156,000
Intake and assessment	\$250,000-\$312,000
Curriculum design/procurement	\$200,000-\$320,000
Training services	\$ 95,000-\$120,000
Online assessment, learning and outreach services	\$ 75,000-\$150,000
Job coaching and mentoring services	\$195,000-\$245,000
Data gathering	\$ 25,000-\$ 40,000
Not to Exceed Price	\$ 1,117,000-\$1,533,000

Every section of the Request for Proposals should be completed in full. If funded, the proposal will provide the basis for contract negotiations, and final negotiated terms will be incorporated within the contract as the Statement of Work.

Any costs incurred by the offeror in preparation, transmittal, presentation of any proposal or material submitted in response to this RFP are borne solely by the offeror.

Bidders should ensure that their proposals comply with the following requirements:

- Proposals must adhere to the format that follows.
- A response to each section of the RFP is required and should follow the guidelines in this document, including titles and subtitles. Each section should be labeled. Cover pages will not count in the page constraints.
- **ALL WRITTEN PROPOSALS SHOULD BE SECURELY BOUND**
 - The use of staples or clips to secure the proposal is discouraged, as missing pages will result in a loss of points.
 - As stated above, all proposals must be provided in both hard copy and electronic format.
- All proposals must be received prior to the deadline in order to be considered.
- Facsimiles will not be accepted.
- NMT requires one (1) original for part 1 and one (1) original for part 2 in hard copy. Originals should be clearly marked as such, and should contain original signatures by your agency signatory.
- **ELECTRONIC PROPOSALS ARE DUE NO LATER THAN 1:00 PM ON January 3, 2003 TO:**

NM Trains
Attn: Project Proposal
5921 Jefferson NE
Albuquerque, NM 87109
(3.5" floppy disk)
OR
Emailed to
boulan@nm.net

- **WRITTEN PROPOSALS MUST BE RECEIVED AT THE ABOVE NM TRAINS ADDRESS OR POSTMARKED NO LATER THAN JANUARY 3, 2003**

All inquiries regarding this procurement are to be directed to Mr. Charles Lehman at 505-345-6555. All funding awards are contingent upon successful contract negotiations, completion of all required contract forms, and availability of funding. NMT reserves the right to reject any or all proposals received, or to seek other solutions through additional or different procurement processes.

It is the sole responsibility of the bidder to ensure that proposals are received at the required location, prior to the stated deadline. Late proposals will be rejected as non-responsive.

DESIGN GUIDELINES

Proposals should include all required information and attachments, and should follow the format in the order outlined below. Parts 1 and 2 must be presented as separate and distinct components.

Failure to respond to a specific item, or to attach requested material, will result in lost points.

Part 1. Proposal and Supporting Documentation

1.1. Title Page with Complete Company Contact Information

Provide a title page indicating that this is a response to the demonstration project of NM Trains and the date of the response.

The title page must indicate:

- The company name
- The company mailing address
- The name and title of the primary individual responsible for this proposal
- The phone number where the primary individual can be contacted
- If desired the following may also be included:
 - A fax number
 - An e-mail address

1.2. Company Prospectus

In two (2) pages or less, provide an overview of your company including:

- Location of the primary business office
- Location of the office administering this proposal
- Years in business
- Company mission and objectives
- Relevant work history

1.3. Proposal Body

1.3.1. Implementation Plan

The proposal must contain all work or project requirements necessary to accomplish the scope of work as defined in this RFP. Include a complete description of the proposed approach and methodology for the project, all project requirements, and the tasks required to accomplish the project. The plan must be in sufficient detail to convey to the evaluation committee the contractor's knowledge of the skills and content necessary for the project. In narrative form explain your approach to the project. Discuss how your firm will perform the proposed services identified in this RFP and the anticipated level of effort. Provide a time frame, breaking the project into tasks, milestones, and deliverables.

Your proposal should:

- Outline your operational approach to the project. Describe project staffing, organization, and internal controls to be used during the course of the project. What staffing of what types of employees in which locations do you anticipate?
- Describe how you will accomplish the required tasks. How will your employees receive orientation, initial training, supervision, and on-going professional development and what would the nature of this training be? How will the training be reflected in a performance evaluation process for employees? In addition, how will call center employees receive orientation, initial training, supervision, and on-going professional development and what would the nature of this training be? How will the training be reflected in a performance evaluation process for employees?
- Describe the types of services that would be provided during the project, from whom and for whom. What pilot community and target population characteristics potentially impact your work? What response will these factors require? How will local resources in the pilot communities be utilized?
- How will your knowledge of the call center work environment support project design?
- Discuss collaboration with local boards and “one-stop” shops to accomplish project goals. What data should be collected and how? What reporting mechanisms should be created?
- Include an evaluation and reporting component for monitoring individual progress as well as a plan that identifies mechanisms for tracking and reporting overall program successes and challenges. The evaluation plan should address staff, clients, and program improvement.
- Conclude with an extended plan for project expansion statewide. How will this occur and when? What is your capacity as a firm for “ramp-up” and how quickly?
- Identify any subcontractors which would be used during this project and describe their roles.

Your attachments for this section might include:

- Sample of prior work product
- Flow chart(s)
- Organizational chart
- Instructional design
- Training plan
- Personnel / staffing plan
- Timeline / Gantt chart
- Sample data gathering template(s)
- Technological plan

1.4. Resumes of Staff (if positions currently filled)

Provide the resumes of all personnel who will manage or perform the work proposed in the implementation plan. Resumes will NOT count toward the page constraint. However, resumes should not exceed 2 pages per individual. Note: Any project personnel not in the initial proposal must be filled within 15 days of contract award and a resume provided.

1.5. References for Projects of Like Scope

List references and contact information for similar projects performed by your company or by members of your proposed team. Sufficient detail should be provided about the work performed for the listed reference to provide context should the review team choose to contact the reference.

Part 2. Proposed Budget and Narrative

2.1. Title Page with Complete Company Contact Information

Provide a title page indicating that this is a response to the NM Trains RFP and the date of the response.

The title page must indicate:

- The company name
- The company mailing address
- The name and title of the primary individual responsible for this proposal
- The phone number where the primary individual can be contacted
- If desired the following may also be included:
 - A fax number
 - An e-mail address

2.2. Budget Narrative

The budget narrative should not exceed five (5) typed pages. Pages should be double-spaced and in a 12-point font.

The narrative should include sufficient detail to support questions associated with the proposed budget and worksheets provided. The budget narrative should be written with sufficient explanation of the assumptions and conditions used in the construction of the required budget documents. These might include such things as:

- Staffing plan –
 - Hiring and growth assumptions
 - Salary and overhead burden assumptions
- Capital equipment purchases
- Travel
- Preparation and presentation of reports
- In-kind contributions being provided by the offeror

2.3. Budget for the Period of Contract Performance

An aggregate budget sheet and supporting worksheets have been provided for completion of offeror proposals. A MS Excel template is available upon request from the NMT Executive Director. Choosing to use and provide the MS Excel template available through NMT does not exclude the offeror from the provision of a hardcopy in this section. Hardcopies should be in a 10-point font and printed in a landscape orientation. Where multiple pages are required, each page of the printed budget must have as its left most column the row headings indicating the line item being shown.

A series of worksheets have been provided as templates for the budget. ALL worksheets must be included in the part 2 documentation. For worksheets that are not relevant to your proposal, mark N/A in the upper leftmost cell and include these with the other sheets. Include these sheets in the packet.

2.3.1. Summary: Proposed Project Budget

The summary sheet should be provided as the first sheet of the budget for the proposal. Sum the totals for overall project cost by the categories listed. The values for the summation of each category should be derived from the supporting worksheets.

New Mexico Gross Receipts Tax must be presented on this page as well. Lack of a value in the Gross Receipts Tax boxes on the summary page will imply that these costs have been accounted for elsewhere in your proposal.

The value presented in the matrix on the summary sheet where the “Total” column intersects with the “Total” row (grayed box) is assumed to represent your proposed total project budget.

On the bottom of this page the offeror must again state the total proposed budget accompanied by the signature of the offeror. Failure to provide the amount or signature on this page may result in disqualification of the proposal.

2.3.2. Employment and Salary Worksheet

The employment and salary worksheet should be filled to indicate the personnel and their associated costs. Personnel are subdivided into two categories – administrative and field personnel.

Administrative personnel are those who will not have direct coaching / mentoring contact with the client. Field personnel are those working directly with the end client.

Enter the position title and the requested information for the appropriate position across each row. In cases where the person who will fill a position is known, indicate the position title followed by a slash and the name of that individual. (Resumes of known personnel should be included in the supplemental documents of part 1).

Where personnel do both administration and field work, they should appear under both the administrative and field categories with the percentage split to each area indicated in the budget narrative. Annual salary should be accrued on this worksheet to either administrative or field according to this percentage. That is, if an employee was proposed at an annual salary of \$24,000 and was split 50 percent to administration and 50 percent to field work one would indicate \$12,000 in the annual salary column for that employee for administration and \$12,000 in the annual salary for that employee under field personnel. Annual increases should not be reflected on this worksheet – just the initial starting figures.

Salary overhead (OH) should include all costs associated with the employment of that individual. As an employee this must include all federal and state taxes, insurances, and benefits like Social Security. Additional benefits such as health care, retirement, vacation and sick leave should also be included in this figure. Sum the annual salary and salary overhead to derive the annual cost of salary and OH for each position.

Indicate the estimated start month and year for each position. Also indicate the end or completion date for all positions. In most cases, this is likely to be the same as the project completion date. However, depending on the tasks allocated under your proposal, some employees may not be employed through the entire project life. Using the start and end dates, calculate the term of employment in months and place this value in the rightmost column. There is no need to total the columns on this worksheet.

Mark the bottom of the sheet with your company name (Offeror Company Name), the date, and indicate the page number. If more than one page is required, indicate this in the space provided at the bottom of the worksheet.

2.3.3. Salary and Overhead Worksheet

Use this worksheet to estimate salary and salary overhead costs over the project life. Again, indicate the position title as per the instructions for the previous worksheet. The sheet indicates this is a nine month project. Within the time frame of the project, quarters are designated. Please indicate the projected quarterly salary and overhead cost for each position. Partial quarters should still be estimated based on a prorated percentage of the work done during this quarter.

Sum the quarters.

Sum all columns on the total row across the bottom. Should you need additional sheets, provide the sum of the columns only on the last sheet. That is, if you prepare two sheets of salary and overhead, do

not enter the sum of page one on the bottom of page one. Instead sum all salary and overhead for pages one and two for each column and enter this value at the bottom of page two.

2.3.4. Travel Worksheet

Because this RFP calls for services in geographically distant areas in New Mexico it is expected that travel expenses could be substantial. Thus, a projected travel budget is required.

The periods for the travel worksheet (and all other worksheets that follow) are the same as the Salary and Overhead worksheet. For each line item, estimate the quarterly expense. Then, sum the quarters to estimate the year. Finally, sum each column to derive the quarterly projection.

Line items have been included in the worksheet. These include air travel, auto travel, rental vehicle expenses, lodging, and meals. Blanks have been included in the worksheet for other travel related expense items.

As with the previous worksheet, should the number of items exceed a single worksheet, prepare a second sheet. Indicate at the bottom that this is the second sheet of the set. As before, sum the columns only on the final sheet.

2.3.5. Other Expenses Worksheet

Other expenses are those costs incurred that have not been included elsewhere in provided worksheets. Some line items are provided. Rent / mortgage is especially relevant given the many locations required for the field coaches / mentors. Detail these arrangements as foreseen in your proposed effort.

Several blanks have been provided for additional inclusions. These may include such items as hookup fees for utilities, ISP services, media expense, etc. Unless these are extraordinary (in excess of 5 percent of the quarterly expenses) they may be aggregated and lumped as a single "other" line item.

Finally, the sheet includes a line item contingency factor. Generally, this is estimated a percent of the total budget. Indicate in the narrative the estimate for this factor.

As before, sum all rows and columns.

2.4. Supporting Materials

Appropriate support materials may be attached to append the budget narrative and the budget. These materials should enhance the understanding of evaluators by providing additional insight into the derivation of the budget. However, these materials should be considered as supplemental and the budget narrative and the budget should be able to stand-alone were these materials not available.

Supporting materials that may be of value to reviewer include:

- Flow chart(s)
- Organizational chart(s)
- Training plan
- Personnel / staffing plan
- Timeline / Gantt chart
- Technological plan

NEW MEXICO TRAINS PROCUREMENT OVERVIEW

PROCUREMENT TIMELINE

November 27, 2002	Request for Proposals Issued New Mexico Technet, 5921 Jefferson NE, Albuquerque, NM 87109
December 6, 2002 9 AM	Bidders Conference - Optional New Mexico Technet, 5921 Jefferson NE, Albuquerque, NM 87109
January 3, 2003 1 PM-electronic postmarked-written	Responses Due no later than <u>boulan@nm.net</u> or 3.5" disk to New Mexico Technet, 5921 Jefferson NE, Albuquerque, NM 87109

NMT reserves the right to declare proposals received after the January 3, 2003 deadlines to be non-responsive.

January 22, 2003 Funding Decision Notification

Questions regarding this Request for Proposals should be addressed to Charles Lehman at 505-345-6555.

NMT is an Affirmative Action/Equal Opportunity

ELIGIBLE BIDDERS

This is an open and competitive procurement process. Eligible bidders are public and private entities that can demonstrate the administrative and technical capacity to provide comprehensive year round services.

END

Part II – Budget Information

Section A – Budget Summary by Categories

1. Personnel	
2. Fringe Benefits	
3. Travel	
4. Equipment	
5. Supplies	
6. Contractual	
7. Other	
8. Total, Direct Cost (Lines 1 through 7)	
9. Indirect Cost (Rate%)	
10. Training Cost / Stipends	
11. TOTAL Funds Requested (Lines 8 through 10)	

Section B – Cost Sharing / Match Summary (if appropriate)

9. Indirect Cost (Rate %)	
10. Training Cost / Stipends	
11. TOTAL Funds Requested (Lines 8 through 10)	