## I.    Synopsis

The International Brotherhood of Teamsters (IBT) Worker Training Program has prepared the following Request for Proposal (RFP) to expand the existing Grant Administrator system to allow for better web integration, remote access, and cross-platform operability.

## II.    Background

### a)    IBT Worker Training Program

The IBT Worker Training Program is part of the IBT Safety and Health Department.  It receives federal grants from several different agencies to provide training to workers.  The purpose of the IBT Worker Training Program's Grant Administrator system is to track the training provided and assist the program office in oversight and administration of the grant programs.

The program has training centers around the country that provide classes in their respective area.  These centers need to be able to access the Grant Administrator system to enter requested classes, and provide the necessary documentation to the program office on any proposed grant activities.

### b)    Grant Administrator System

To track all of the required information, the IBT Worker Training Program developed the Grant Administrator system.  This system is designed to allow the IBT Worker Training Program to fulfill the oversight and reporting requirements associated with federal training grants.

The current grant management system includes three components-

1.  MS Access front end: This is used by staff at the Program Office to track, record, and efficiently manage several grants the IBT Worker Training Program has received.  Currently, remote users enter some data- the objective of this proposal is to move all remote user activities to a web-based application.
2.  Microsoft Azure SQL Server: All of the system's data is stored here.  It connects to both the desktop database and the website.
3.  Web-Based Application: The IBT Worker Training Program's website currently gathers some information via the website- the goal of this project is to move all data entry from the field to the website.

## III.    Proposed Statement of Work

Any responses to this RFP should include the following items as part of the statement of work.  Any submissions that do not include these items will be considered non-responsive and discarded.

### a)    Web Based Application

1.  Nonproprietary, so that maintenance and upgrading after launch can be performed by in-house staff or by other, external contractors without need of relying permanently on website development vendor
2.  Fully compatible with latest and emerging browsers
3.  Intuitive and easy to use for staff working as web editors, who have minimal programming or other technical expertise

4. Ability to define users with roles and permissions, including administrators, editors, and content creators, with access controlled based on role and webpages or website sections
5. Ability to schedule publication and expiration of content such as upcoming class schedules.
6. Ability to edit and publish content from a mobile device
7. Document upload and download functionality (e.g., of multiple PDF files), with structure that enables archiving and document management
8. All pages and features must load quickly and correctly across all major web browsers
9. Average load time must be 3 seconds or less under normal conditions and course of business

The Web-Based Application will have the ability to capture, store, and produce reports from the following information:

- Classes
    - Start/End Date
    - Course Type
    - Class Location
    - Grant Charged
    - EPA/DOE Site
    - Scheduled Instructors
    - Students Registered
    - Students Attended
- Instructor Time
    - Date of Activity
    - Hours
    - Activity
    - Grant Charged
    - Associated Class (See above)
- Instructor Travel Arrangements/Expenses
    - Dates of Travel
    - Modes (Air, Train, Rental Car, Mobile Unit, Personal Vehicle)
    - Associated Fare
    - Mileage (for Personal Vehicles)
- Student Information
    - Name
    - Address
    - Phone
    - Email
    - Demographic Information
    - Classes Registered For
    - Classes Completed
- Equipment Inventory
    - Type
    - Manufacturer
    - Model
    - Cost
    - Tag/Serial Number
    - Date Acquired
    - Staff/Training Center Assigned
    - Status (Active/Removed)

## b) Permission Groups

On logging in, users should be able to perform different functions, depending on their assigned permissions.  These include:

- Student: Students need to be able to log in to view/print their own transcript, update their information, and register for classes.
- Instructor: Instructors should be able to enter classes and requests to travel/work for themselves.  They should also have all of the permission for any student who has attended a class conducted by their training center.
- Training Center Administrative Staff: Training Center Administrators should have all the permissions of an instructor, as well as the ability to approve work/travel requests on behalf of the Training Center.   The Training Center Staff should only be able to access student records from classes their center conducted.
- Program Office Staff: The Program Office staff should have the permissions to approve work/travel requests from training centers, as well as the ability to view/edit any information stored in the database.

## c) Testing

The following are expectations for troubleshooting and testing prior to launch:

1. The vendor will develop a series of use cases to test the system, the functional requirements, and the integration
2. The vendor will provide an automated troubleshooting procedure in which defects and fixes will be identified and remediated in an expeditious manner
3. All issues found during testing must by documented by the vendors; the resolution for the corresponding fix should also be documented and submitted to IBT Safety and Health Department during the test process and prior to system signoff
4. Critical problems or issues that impact implementation schedules of any component and/or IBT Safety and Health Department primary business functions must have a reliable and technically sound response that allows IBT Safety and Health Department's staff to interact directly with the solution provider's application developers and analysts in order to achieve a rapid solution
5. Vendor will fix bugs and provide solutions in a timely fashion and provide status reports during testing and implementation
6. The vendor should provide detail on how regression testing is performed before migrating into the production environment for the initial go-live and for any future releases
7. IBT Safety and Health Department requires that the vendor perform load testing prior to going live. Test plans must also include testing of all system integration points

## d) Security

A high level of system and data security is a critical attribute of all IBT Safety and Health Department systems. It is envisioned that some pages on the new website solution will be populated with data (e.g., student names, addresses, phone numbers, etc.) from other training centers and that access to certain information will be based on log-in credentials. Vendors should describe their security policies and protocols to ensure that IBT Safety and Health Department's data are protected. This should include how you protect your systems from viruses, backup procedures, access logs, data store and transfer processes, and accessibility of audit trails.

No IBT Safety and Health Department data should be made available or accessible to any third party or data source other than those that have been authorized through this contract to work with IBT Safety and Health Department and the chosen vendor. In case the contract between IBT Safety and Health Department and vendor is discontinued, the vendor must provide IBT Safety and Health Department with all of its data within 30 days of the termination of the contract.

In addition, security must be engineered into the system itself. Given the expected lifespan of this system, it shall be able to adapt to future security needs, allowing for flexibility and expandability. The system as a whole shall be capable of resisting a concerted system compromise effort from both internal and external threats. The solution shall also provide stringent security and access controls with clear and consistent access policies for users.

### e) Support

1. Proposals should include at least 1 year of support for all components of the grant administrator system.  This includes any requested edits/additions to proposal elements, and support for the existing system
2. The software maintenance agreement must cover a twenty-four (24) hour, seven (7) days a week operating window (24/7). The vendor must correct any material programming errors that are attributable to the vendor within a reasonable time, provided IBT Safety and Health Department notifies the vendor, either orally or in writing, of a problem with the software and provides sufficient information to identify the problem
3. The warranty period is to begin on the day of system acceptance, not the day the software is loaded on the system
4. The vendor must provide maintenance during the warranty period at no cost to IBT Safety and Health Department. That maintenance program must include all new releases, updates, patches, and fixes to the commercial software. It also must include a commitment to keep the software current with the operating environment in which it is designed to function and a commitment to promptly correct all material defects in the application


### f) Project Management

1. Maintain communications with IBT management to achieve the objectives of the project.
2. Provide on-going support to IBT staff to effectively manage tasks as per the project work plans.
3. The vendor will work with IBT to establish documentation and procedural standards.
4. Establish overall project organization framework and control.
5. The vendor will identify key milestones and completion dates.
6. IBT and the vendor will measure and evaluate progress against project plan.



## IV.   Additional Requirements

### a) Personally Identifiable Information

Any Personally Indefinable Information stored in the grant administrator system must be secured in accordance with the applicable federal regulations.

b) Qualifications

The selected vendor shall:

1. Have experience building fully featured, content-rich websites for large public or nonprofit entities (e.g., government agencies or departments, school districts or universities, etc.); URLs of three such websites must be included in the proposal
2. Have demonstrable experience developing websites that meet or exceed the general metrics currently experienced by IBT Safety and Health Department's existing websites; URLs of three such websites must be included in the proposal
3. Directly employ and assign to the project staff members with professional qualifications to directly execute or oversee the work of subcontractors for programming, graphic design, web writing, web editing, and content management; information regarding employee qualifications must be included in the proposal
4. Designate an appropriately qualified employee as project manager, who will be the primary point of contact for IBT Safety and Health Department. The project manager must have excellent technical, verbal, and written communication skills, and be astute and accomplished in presenting information to multiple IBT Safety and Health Department stakeholders

c) Ownership

Note that at all phases of the project, ownership of all files, graphics, logins, and other related digital and non-digital materials and assets remain the property of IBT Safety and Health Department. At the completion of the project, all of the preceding will be in the sole possession of IBT Safety and Health Department

d) Experience and Capabilities

Offeror shall provide information on past and current experience with rendering services similar in size and scope to those in this RFP. This description shall include:

1. Summary of the services offered including the number of years the Offeror provided these services; the number of clients and geographic locations the Offeror currently serves, etc. and has served; and if a past customer, why the Offeror is no longer providing services
2. Organizational chart of the Offeror showing the major components of the unit(s) that will be performing the requirements of this contract; where the management of this contract will fall within the organization; and what resources will be available to support this contract in primary, secondary and back-up roles
3. Name all key personnel who will perform work under this contract and include each individual's resume. Include work history, educational background and indicate the proposed role/function of each individual
4. At least five (5) recent references from its customers who are capable of documenting the following: a) the Offeror's ability to manage similar contracts, b) the quality and breadth of services provided by the Offeror under similar contracts

Failure to provide any of the requested information or documents in this solicitation may render the bid non-responsive.