Markle Foundation
Request for Proposal for Third-Party Evaluator

Dear Vendor:

John & Mary R. Markle Foundation, a New York 501(c)(3), ("Markle") is pleased to invite your company to submit a response to our Request for Proposal ("Request" or "RFP") as Markle works to advance the adoption of skills-based practices to ensure that the future of work supports all Americans.

We believe that your company ("Vendor") may be positioned to help Markle measure, evaluate, and inform the work of the Rework America Business Network, a Markle initiative that unites leading Fortune 500 employers to influence change across the employer landscape.

Within this document you will find the guidelines and response instructions that must be followed in order to submit a valid response. Your responses will be evaluated based on meeting Markle's requirements, terms and conditions set forth in this Request, and the perceived value your company will bring to Markle.

It is Markle's practice to conduct business with prospective and current suppliers with uncompromising integrity and professionalism and to grant all competitive and qualified suppliers that submit proposals equal consideration during the bid process. Our internal team has worked hard to make this Request as comprehensive as possible. However, should you have any questions that might limit your ability to respond, please document them all in one email and send them by 5 p.m. ET on Monday, March 11, 2019. Markle will, in turn, compile all the questions and supply answers to all respondents via email.

With that, we look forward to reviewing your response and further understanding what ideas you have for evaluating and advancing the impact of our work.

Sincerely,

Michele Chang & Nick Fogel
John & Mary R. Markle Foundation

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I. About Markle

Since its inception in 1927, the John and Mary R. Markle Foundation has worked "to promote the advancement and diffusion of knowledge among people of the United States, and to promote the general good of mankind." Currently, Markle is engaged in a nationwide initiative aimed at driving innovations that expand opportunities for employment and broaden ways for all Americans to learn and train for the work of the future.

Inspired by our Rework America initiative, which brought together a diverse group of leaders to identify and discuss innovative strategies for preparing workers and businesses to thrive in the 21st century digital economy, Markle developed Skillful in 2016. In partnership with Microsoft, LinkedIn, the state of Colorado, and many others, Skillful brings together key players across the labor market, including employers, state and local government officials, educators and workforce centers to help job seekers, workers, businesses and educators adapt to the changing workplace and get and advance in in-demand jobs. Skillful provides data, tools, and resources that enable businesses to define the exact skills they seek and turn those insights into a skills-based hiring process that allows job seekers and workers to demonstrate and articulate the skills that they can bring to an organization.

Building on the achievements and learnings of Skillful and Rework America, the Markle Foundation launched the Rework America Task Force (RATF) in 2017. RATF, a coalition of influential leaders from some of the world's leading organizations and institutions, seeks to use the same digital technology that is disrupting the economy today to create practical solutions that will transform America's labor market from one largely based on traditional credentials, such as degrees and work history, to one rooted in the skills and lifelong learning valued in the digital economy.

Data suggests that by 2030, 23% of work hours performed in the U.S. today could be automated with currently demonstrated technology – and that figure could grow to 46% by 2055. While automation on this scale is certain to alter life for Americans, RATF believes that with the right policy and practice changes, the shift can be a positive one. With a massive re-skilling effort – and shifts in employer hiring behavior – 95% of at-risk workers could find new higher-paying jobs.

To identify and champion the policy and practice changes required for this shift, RATF is convening networks of leaders in business, education, and government. One of these networks, the Rework America Business Network (RABN), launched in December 2018 with a founding cross-sector cohort of 11 innovative Fortune 500 companies united behind the goal of advancing business competitiveness and opportunity for American workers by increasing the adoption of evidence- and skills-based talent practices among American employers.

For more information, visit www.markle.org.

II. Guidelines

1. Vendors are to direct all communication regarding this Request to the following:

   Nick Fogel
   EMAIL: nfogel@markle.org

2. **Responses must be received via the email address above by close of business day (5 p.m. ET) March 25, 2019**

3. Any questions regarding the Request must be submitted in writing to Nick Fogel via email at the address listed above. Answers to questions raised will be provided to all respondents. ***No questions will be accepted after 5 p.m. ET, March 11, 2019.***

4. Timelines for this Request are as follows:

Date	Event
March 11, 2019	Questions due
March 14, 2019	Responses to questions posted
March 25, 2019	Responses due from participating vendors
April 5, 2019	Vendor selected

5. In the event it becomes necessary to revise the Request, addenda will be forwarded to all who received the original Request. For avoidance of doubt, Markle expressly reserves the right to extend the response date.

6. Responses may be withdrawn at any time up to the submittal date. Withdrawal should be in writing on company letterhead, signed by an authorized employee of your firm, and sent from the email account of an authorized employee or your organization. The letter should be sent to the parties noted above.

7. All responses will be considered property of Markle and will not be returned to you.

8. All responses must be submitted electronically. No telegraphic, faxed, or telephone responses will be accepted.

Non-Disclosure / Confidentiality Vendor agrees that at all times during this Request, and for five (5) years thereafter, Vendor will hold in strictest confidence, and will not use or disclose to any third party, any confidential information of Markle. The term "confidential information of Markle" shall mean all non-public information that Markle designates as being confidential, or which, under the circumstances of disclosure ought to be treated as confidential. "Confidential information of Markle" includes, without limitation, the terms and conditions of this Request, information relating to released or unreleased Markle software products, business policies or practices of Markle, job seekers or suppliers of Markle, or information received from others that Markle is obligated to treat as confidential. If Vendor has any questions as to what comprises such confidential information, Vendor agrees to consult with Markle.

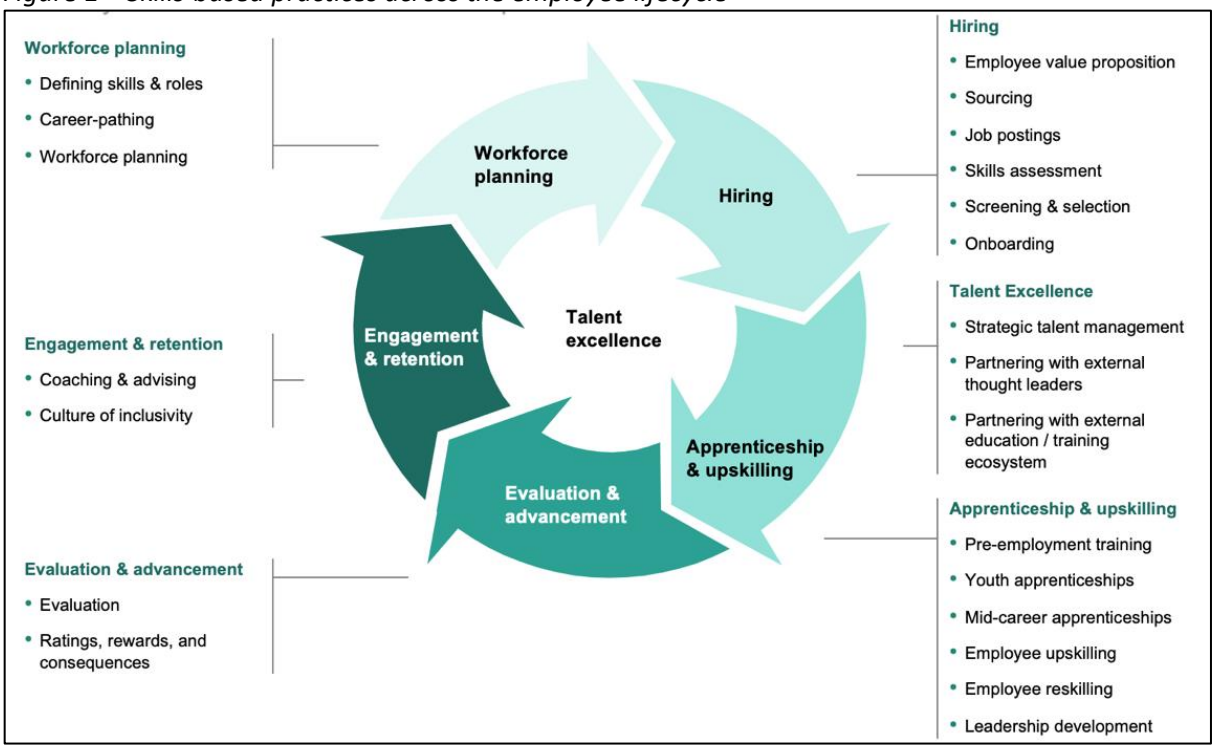
III. Introduction and Background

The ultimate goal of the Rework America Business Network (RABN) is to increase the number of American workers with pathways to career success. In an era of automation and rapid technological change, creating an inclusive economy has become a central political, cultural, and economic challenge as millions fear for their place in the future of work and millions more worry that they've already been left behind. RABN believes building an economy that works for everyone requires transitioning to labor market that recognizes and rewards skills wherever they are acquired rather than relying on traditional proxies like a 4-year college degree that lock huge swaths of the population out of the workforce.

This shift to a skills-based economy begins with employers. Employers must better understand the skills they need workers to possess and more clearly communicate those skills to job seekers and educators. They then need to develop new methods for assessing competency and use those methods in place of traditional screeners like a 4-year college degree. They also need to invest in training their workforce, enabling their workers to access the lifelong learning required to develop new in-demand skills and adapt as the company's needs evolve.

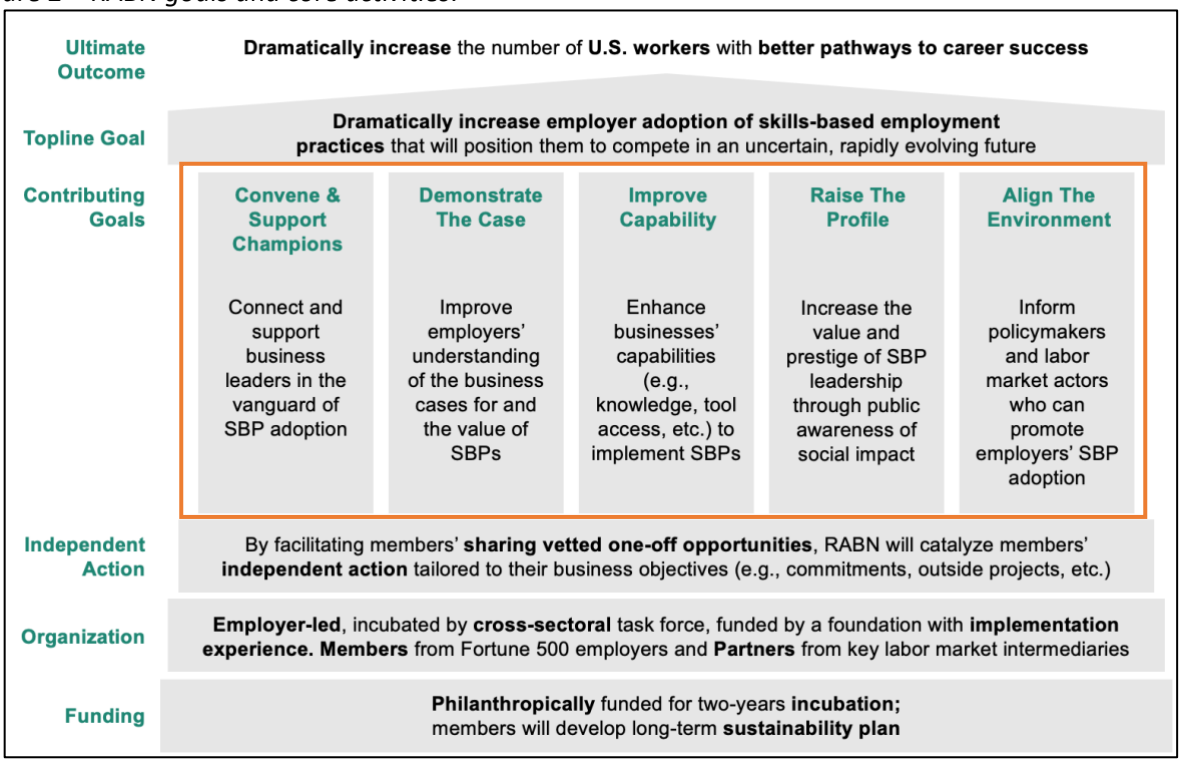
Figure 1 below illustrates the full range of skills-based practices and how they work together to create a holistic employee experience.

Figure 1 – Skills-based practices across the employee lifecycle



RABN was formed to pave the way for wider adoption of skills-based practices among American employers. To achieve that goal, RABN is undertaking work across five key pillars outlined in figure 2 below.

Figure 2 – RABN goals and core activities:



Since its inception in early 2018, RABN has made progress in each of these areas, including recruiting member organizations and establishing an 11-member founding cohort of CHROs at Fortune 500 companies, hosting two convenings, publicizing a formal launch in December 2018, and undertaking a digital literacy pilot program with a handful of members. Figure 3 below outlines progress to date and core objectives for each of RABN's five pillars.

Figure 3 – Detail on core pillars of work:

	Convene & Support Champions	Demonstrate the Case	Improve Capability	Raise the Profile	Align the Environment
Description	Connect and support business leaders in the vanguard of SBP adoption	Improve employers' understanding of the business cases for and the value of SBPs	Enhance businesses' capabilities (e.g. knowledge, tool access, etc.) to implement SBPs	Increase the value and prestige of SBP leadership through public awareness of social impact	Inform policymakers and labor market actors who can promote employers' SBP adoption
Key questions	Which specific individuals are required to increase SBP adoption among U.S. employers?	What evidence exists to support the case for adoption for each SBP? How robust is the case? Where could the case be improved? What is the ROI?	What are the internal barriers to adoption? Do companies have the resources necessary to implement SBPs?	Are key individuals aware of SBPs? What is the best way to influence these leaders and drive awareness?	Beyond employers, what conditions would need to exist for widespread SBP adoption to take place?

Progress to date	• Launched network with founding cohort of 11 HR executives • Hosted two convenings	• Created high-level draft of field guide for CHROs with initial scan of evidence for each SBP	• Launched digital literacy pilot program with a handful of members	• Conducted PR campaign to support RABN launch • Developed partnerships to increase RABN reach, including YouTube	• Formed partnerships with a number of key players, including Workday • Worked with Governors network to identify high-level areas for policy support
Planned initiatives	• Expand membership • Host biannual convenings • Create list of key influencers and establish relevant segmentation and points of intersection (e.g. industry organizations) • Attend key conferences and partner with existing networks (e.g. Business RoundTable) to expand reach	• Catalog existing evidence for each SBP and identify gaps • Write case studies on exemplar companies • Develop a CHRO Field Guide outlining the case for each SBP and next steps for implementation • Run digital literacy pilot and use findings to build case for wider adoption	• Research current barriers to SBP adoption among F500 employers • Develop a CHRO Field Guide outlining the case for each SBP and next steps for implementation • Run digital literacy pilot and identify knowledge and partners necessary to scale efforts	• Catalog media consumed by key individuals (e.g. blogs, podcasts) • Create a mechanism for tracking how frequently SBP terms appear on these media • Create curated content (e.g. op-eds, field guide) • Mobilize members to amplify SBPs	• Develop a set of policy recommendations for employers to present to policymakers • Work with largest HRIT and ATS providers to ensure their systems support SBPs • Host joint convenings for RABN members with policymakers and innovative educators
Target outcome	Key leaders required for ushering in widespread SBP adoption are connected to each other and communicate regularly on best practices / ways to increase SBP adoption	Sufficient evidence exists for each SBP to enable HR executives to champion their adoption and make the case to C-suite executives	Businesses are equipped with the knowledge, tools, and access to partners necessary to implement SBPs	HR executives, operational leaders (CEO, COO), and other business executives, especially at F500 companies, are aware of SBPs and their benefits	Partners necessary for widespread adoption of SBPs (e.g. policymakers, HRIT providers) are aware of ways in which they can support employers and are actively working to remove barriers / create incentives

IV. Objectives and output

RABN is expanding over 2019 and is looking for a third-party provider to help:

- develop a set of metrics to estimate the impact of RABN's efforts and a methodology for regularly tracking those metrics,
- establish a replicable model for tracking awareness and adoption of skills-based practices among American employers over time, especially among key individuals required for widespread change (e.g. HR leaders and other executives at Fortune 500 companies, policymakers, HR technology leaders),
- create high-level models of the potential impact on workers and businesses of adopting individual practices along with a measure of the relative difficulty of implementation to inform prioritization, and

- serve as a thought partner for refining and prioritizing planned initiatives across RABN's five pillars of work outlined above

Markle would consider the engagement successful if at the completion of the work, the provider had:

1. Identified key metrics to determine success across each of RABN's five pillars of work and developed a process for calculating and tracking those metrics on a regular basis
2. Established a high-level baseline for awareness and adoption of skills-based practices among American employers
3. Created a strategy for determining a more detailed measure of general sentiments, awareness, and adoption of skills-based practices among American employers and a process for tracking changes over time
    a. Figure 4 illustrates our current understanding of the SBP adoption curve. Upon completing the work, RABN would like to possess a rough estimate of the size of each bucket and have a process in place for refining that estimate and tracking it over time
4. Reviewed existing data on SBP adoption, identified gaps that RABN should prioritize filling (e.g. new survey), and developed a detailed plan for addressing those gaps (e.g. target audience, key learning questions, potential partners)
5. Aligned on a series of models for estimating the potential impact of a select group of SBPs, including key metrics and data sources for calculating those metrics
    a. Figure 5 outlines a draft model for estimating the potential impact of youth apprenticeships. As part of the work, we would like to develop high-level models like this for the other SBPs

Figure 4 – Sample adoption curve for new employer practices and accompanying metrics

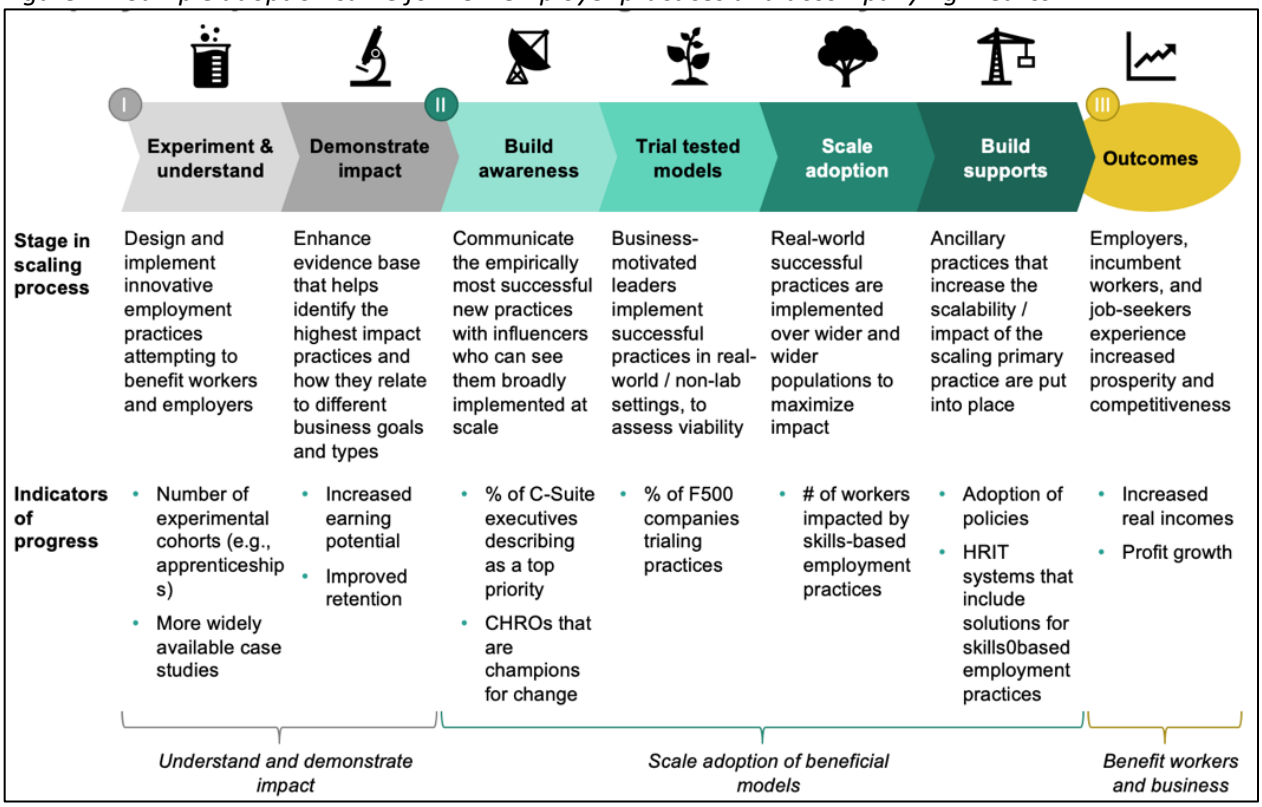


Figure 5 – Sample model on impact of youth apprenticeships

Category	Metric	Statistic	Source
Estimated adoption	Number of U.S. apprenticeships in FY17	533,607	U.S. Dept. of Labor, Employment and Training Administration, Registered Apprenticeship National Results Fiscal Year (FY) 2017
	Average age of registered apprenticeship participants	28	Federal Reserve Bank of Philadelphia, Cascade: No. 90, Winter 2016
	Assuming a uniform distribution of apprentices across program participants' ages	uniform	RATF staff hypothesis
	Assuming participation in a registered apprenticeship program begins at 16	16	National Apprenticeship Act of 1934, 29 C.F.R. Section 29.5(b)(10)
	Average duration (years) of a U.S. apprenticeship program	4	Bureau of Labor Statistics, Apprenticeships: Occupations and outlook, November 2017
	Share of U.S. apprenticeships not registered with DOL	5%	RATF staff hypothesis
	Current estimate of youth apprenticeships	93,615	
Remaining opportunity	Expected number of U.S. high school graduates 2018-2019	3,600,000	National Center for Education Statistics, Fast Facts: Back to School Statistics
	Average duration (years) of a U.S. apprenticeship program	4	Bureau of Labor Statistics, Apprenticeships: Occupations and outlook, Elka Torpey, November 2017
	Percent of German young people pursuing apprenticeship training, rather than university training	60%	The Atlantic, "Why Germany Is So Much Better at Training Its Workers?"
	Realistic / desirable 10-year progress towards a German-style youth apprenticeship model in the U.S. labor market	10%	RATF staff hypothesis
	Estimated opportunity	770,385	
Worker impact	Earnings impact	$300,000 increase in total career earnings	U.S. Dept. of Labor, Apprenticeship Toolkit: Advancing Apprenticeship as a Workforce Strategy
Employer impact	ROI estimate	47% ROI across Canadian firms, in line with 40-50% ROI in select U.S. trials	Federal Reserve Bank of Philadelphia, Cascade: No. 90, Winter 2016 Apprenticeships and Their Potential in the U.S.

V. Scope of work

RABN envisions spreading the work across two distinct phases – a shorter planning phase and a longer one for implementation.

Phase 1 would involve creating a set of potential methodologies for (1) measuring awareness and adoption of SBPs among American employers over time and (2) evaluating RABN's impact across its core workstreams. These methods could include using existing data sources, creating new data through use of surveys, or employing other qualitative and quantitative techniques (e.g. focus groups, tracking Twitter mentions, etc.). While RABN is open to working with the providers to determine exact timing,

we expect that the first phase would last no more than 2-3 weeks. At the conclusion of phase 1, RABN would work with the provider to select an evaluation strategy from the range of identified options. RABN may select all, some, or none of the recommendations.

Phase 2 would then consist of helping RABN implement the strategy, including identifying relevant data sources; scoping the key questions, objectives, and logistics of any new data source (e.g. RABN survey); creating a regular cadence for data collection; and establishing a step-by-step model for RABN to replicate upon the project's completion.

Markle reserves the right not to proceed to phase 2 of the work if it so chooses or to select another vendor or vendors for that work.

Figure 6 provides detail on the tasks Markle is looking for a third-party provider to take on and how that work would be divided across the two phases.

Figure 6: Key provider objectives and proposed timing

	Phase 1	**Phase 2**
Develop an approach for measuring RABN's impact over time	Propose a menu of metrics and accompanying estimation methodologies from which the RABN team may select all, some, or none to work with Vendor on in Phase 2; each proposed methodology should include an estimate of accuracy, effort, and cost	If project continues to phase 2, RABN will work with provider to select an evaluation strategy from the proposed list of methodologies; in phase 2, provider will implement several short-term measurement initiatives to estimate RABN's impact at a high-level and develop a strategy for more in-depth, longer-term evaluation
Inform the development of a replicable model for tracking awareness and adoption of skills-based practices over time	Propose methodology for establishing a baseline for SBP awareness and adoption and a method for tracking awareness and adoption over time (e.g. survey, aggregation of relevant news articles or Twitter mentions, etc.); provider should identify a range of possible methodologies along with an estimate of accuracy, effort, and cost for each	RABN will work with provider to select an evaluation strategy from the proposed list of methodologies; in phase 2, vendor will help develop a strategy for tracking relevant metrics over time, including working with Markle to identify potential partners, where relevant
Develop a model for assessing the potential impact of each skills-based practice on workers	None	Propose a model for estimating the potential impact select skills-based practices could have on workers, including relevant metrics (e.g. number of workers impacted, increase in wages, increase in labor force participation)
Serve as a thought partner to refine and stress test planned initiatives across	Provide feedback on key learning questions and timing for each of RABN's planned initiatives	Provide recommendations on projects for RABN to take on to further its mission; include high-level estimate for impact of each project and, where

RABN's five pillars of work		possible, potential funding sources for the project

In addition to these core objectives, Markle is looking for a vendor to synthesize the above data, insights, and anecdotes into deliverables (e.g. PowerPoint presentation) for RABN and Markle leadership and staff and to share a summary of initial findings and proposed methodologies at the RABN Spring Salon in late April or early May. Markle is also looking for a vendor to create a handoff strategy to ensure aspects of the work that require on-going attention are identified with a clear plan for steps RABN should take to pick up the work.

Markle can work with RABN member companies to collect data required to achieve these objectives. Markle also has partnerships in place with several data providers and is willing to develop further partnerships as necessary to gain access to valuable datasets or establish new ones. Markle would like a partner willing to think about how data available via these sources could be used to supplement data collected from traditional sources (e.g. BLS).

VI. Proposed project timeline

Markle anticipates the work contemplated by this RFP will take a few months to complete and has indicated a sample timeline below. In responding to this RFP, please include a proposed project plan, outlining key milestones and deliverables. Markle will work with vendors to ensure the timeline is mutually agreeable and feasible given other priorities. The services to be performed hereunder are non-exclusive and Markle shall remain free to purchase similar services from other parties or to provide such services directly.

The following represents a proposed timeline. This timeline can be refined based on input from the selected third-party evaluator:

- Beginning of April 2019: Project kickoff with presentation of refined project plan, deliverables, and key milestones
- Phase 1
    - Mid-to-late April: Pull-up meeting to review options coming out of phase 1 and align on phase 2 work; Markle reserves the right not to proceed to phase 2 if it so chooses
- Phase 2
    - End of April or early May 2019: Provision of first-round of data and insights to Markle to share with RABN members at Spring Salon
    - End of May 2019: Project check-in to review progress to-date
    - End of June 2019: Final project meeting, including key project deliverables outlined above and handoff plan for ensuring recommendations are actionable
    - Mid-July 2020: Final project wrap-up call to review any outstanding questions or items of work from meeting

RABN believes strongly in open and frequent communication and anticipates setting up a weekly project check-in and regular ad hoc joint working sessions.

VII. Selection criteria

The objective of this Request for Proposal (RFP) is to locate a third-party evaluator with the capabilities and experience to successfully achieve the provided tasks as scheduled and at a competitive, reasonable price. Markle will evaluate proposals based on, among other things, the following factors:

1. Quality of response to RFP
2. Relevant past performance/experience
3. Technical expertise/experience of bidder and bidder's staff demonstrated through anonymized summaries of past projects
4. Cost

Markle will make all judgments in its sole discretion and is not obligated to select any of those organizations submitting responses.

VIII. Submission guidelines & requirements

- Evaluator overview and background: A high-level overview of the evaluator's background and relevant experience, including any experience working with internal data for large employers
- Proposal: A high-level plan on how to achieve the provided objectives generally in line with the proposed timeline and scope of work provided above
- Proposed team: An overview of the team and resumes or professional overviews of the personnel who would be involved and a high-level overview of each person's role in this work; if fee is based on hourly rates, please detail those rates for each team member in the proposal
- Proposed timeline: Building on and/or refining the provided timeline, provide a proposed schedule and milestones for this effort
- Price: Please break price into key components; please provide a cost estimate for each phase. Markle reserves the right not to continue to the second phase of work, or to select another vendor or vendors to undertake that work
- Example work: Supply overviews or example deliverables from 2 to 3 example projects similar in nature to this project as example material
- References: Provide 2 to 3 references

Please submit your proposal to Michele Chang (mchang@markle.org) and Nick Fogel (nfogel@markle.org) by Monday, March 25, 2019 via email. The RABN team may conduct follow-up conversations and/or interviews with each finalist before final selection. Markle plans to select a final evaluator or terminate the RFP without selecting a final evaluator by Friday, April 5. Markle is under no obligation to award any contract as a result of this Request.

Markle may negotiate with one or more Vendors who submit responses that, in Markle's sole judgment, are susceptible of contract award, and may negotiate with such Vendors or with other firms in any manner that Markle determines in its sole discretion to be in its best interests. Either the Vendor or Markle may suspend or terminate negotiations for any or no reason. The decision to commence, continue or terminate negotiations with any Vendor or other firm is solely at the discretion of Markle and Markle may, in its sole discretion, invite any Vendor to commence negotiations at any time.