



***The Learners Lab (TLL)***  
*A Public Foundation*

Is issuing the following solicitation:

**REQUEST FOR APPLICATIONS (RFA)**

**FOR**

**FOUNDATION SUPPORT PARTNERSHIP (FSP)**

**VENDORS PARTNERING TO SUPPORT FOUNDATION PROGRAMS**

**TIME SENSITIVE**

**APPLICATION DEADLINE: SUNDAY, JUNE 4, 2017**

Responses to this RFA are due on the above cited date with no extensions

Queries are accepted in writing only.

**US Entities Only Please, Thank You.**

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**LETTER OF INVITATION**

To All Offerors, Thank you in advance for your time!

You are cordinally invited to consider to this **Request for Application (RFA)** presented by **The Learners Lab (TLL)**. **The Learners Lab** is new a public foundation that designs, operates, and manages charitable and fiscal sponsorship programs in the United States. *The Foundations* efforts will establish and/or secure access to unrealized resources that result in empowerment & enhancement for:

- (a) workforce training across all business types, sizes, and industry, and
- (b) the capabilities of young and developing tax exempt entities within the US.

Our schedule of activities for this application process goes as follows:

<u>ACTIVITY TIMELINE</u>	<u>DATE/TIME</u>
<b>RFA Release Date</b>	<b>May 4, 2017</b>
Deadline for RFA Questions	May 21, 2017
<b>Applications Due to <i>The Foundation</i></b>	<b>June 4, 2017</b>
Selection	Ongoing thru June 9, 2017
Notifications	Ongoing thru June 15, 2017
Public/Published Announcements	June 16, 2017
<b>Individual Program Support Project Launch</b>	<b>As Dictated by Award/Program Needs</b>
Foundation Conference Call with FSPS Partners	Desired for the week of June 18 <sup>th</sup> ; To Be Finalized by Availability Questionnaire

Given we also rely heavily on many of the same support services as our Awardees and our mission activities are so repetitive, *The Foundation* will rarely if ever issue RFPS, RFAs, RFQs, and RFI's. To meet our own needs as well as the needs of our Awardees, Partners, Members, Program Patrons or other stakeholders more creative thinking is required.

Since the need for issuing solicitations will become virtually constant, those efforts would essentially create a production assembly line and that will be both counterproductive to our ability to develop cost and time effective programs and solutions for our stakeholders and a disservice to them as well.

Instead, we are establishing this dedicated pool of support partners who are willing assist *The Foundation* in its work of helping young tax exempts and individuals in the workforce. In doing so, they will come to rely on the products, services, and programs *The Foundation* will provide and place tremendous value on the partners who contribute to make that possible.

Thank you again for your time, interest in our request, and for your consideration of *The Foundations* work. We hope you find value in what we are trying to do, and look forward to hearing from you.

Warmest Regards,

Jerri D. Thomas MBA, MPA  
 Founder, CEO & Chief Resource Officer  
 The Learners Lab (TLL) TaxId 45-5222602

## ABOUT THE FOUNDATION

*The Learners Lab (TLL)*, is a volunteer public foundation that designs and operates a portfolio of Charitable & Fiscal Sponsorship programs. *The Foundation* has three focus areas: workforce training, organizational development for young 501(c) 3's, and supporting other charities.

Our mission is to develop, acquire and provide access to free and discounted professional development resources, help future tax exempt entities become established, and help young tax exempts launch & mobilize their operations.

The impact from and outcomes of *The Foundation's* efforts are designed to...

- create a demand for skilled, pre-trained interns & apprentices
- eliminate start-up and growth obstacles,
- fill resource gaps, barriers or the access to them, and
- partner with OEMs, vendors, & other solution providers to secure free & *heavily* discounted products, services, & technologies,
- establish peer-to-peer and mentor relationships amongst and between these collegial groups

*The Foundation* also:

- award complimentary fiscal sponsorships & memberships as resources permit
- award training fellowships in proprietary subject areas it will custom design,
- establish a running list of other public foundations & charities to whom it will make direct support contributions
- provides management consulting & technical assistance services to any tax exempts requesting help,

*The Learners Lab* is headquartered in Lanham, Maryland, and is currently staffed & supported by volunteers. It received its letter of determination granting its tax exempt status under IRS Code 501(c)3 in February 2015, for which donors will enjoy a 50% tax credit for their donation or contribution.

## PARTNERSHIP NEEDS & EXPECTATION

One of the essentials of any new business, and for tax exempts in particular is funding & materials. Securing necessary resources like grant writing is exceptionally challenging for a new business trying to get established because of the cost and required commitment of time, and seems virtually impossible when pursuing tax exempt status, be it with or without a fiscal sponsor. Technology, software, web services, office space, supplies and other essentials are equally challenging to secure, and without funding or credit worthiness often means having legacy software that is out of date and computing/office equipment that's a tab more than well-used.

Why create a Partnership Group instead of Issue RFPs and other Solicitations?

To help mitigate these difficulties, *The Foundation* is establishing its own dedicated group of vendor and business supporters will serve as continuous supplier of the products and services *The Foundation*, and more importantly the Foundations Fiscal Sponsorship Awardees and Programs can rely on. This group will be known as **The Foundation Support Partners (FSP)**.

Businesses & Vendors applying to join **The Foundation Support Partners** is of interested and will be a key support we provide to our Fiscal Sponsorship Awardees especially for Awardees that require grant writing and development services, which thus far has been more than 90% of our applicants.

*While we intend to keep mandatory requirements to a minimum; a key condition of a Foundation Support Partners is the willingness to donate AND significantly discount the product or service that will be offered the Foundations Awardees and Programs.* Remember, we were each a start up at one point without funding or business resources. Many of our awardees will have no funding stream in place, unreliable access to basic operational resources. Helping these new organizations access the initial funds & resources they will need is the point and purpose of our work, and we are hoping for the same type of commitment from RFA Applicants interested in partnering with us.

## PURPOSE OF THIS REQUEST FOR APPLICATIONS

The purpose of this RFA is to:

- (a) appeal to peers in the business community for their contribution in supporting the new peers who have or are joining our business community along with the workforce that must sustain it
- (b) assess project scope specialties and preferences for the purpose of establishing snapshot reference resource to more effectively task the Foundation Support Partner with an Awardee
- (c) assuring a sufficient pool of Supporting Partners to effectively manage and to evenly disperse support for an ever increasing portfolio of fiscal sponsorship awardees
- (d) compile a matrix by business and vendor of what products and service, as well as reduced cost vs. donated services would entail (sample of breakdown chart)
- (e) establish a Go-To data repository (which will be the sole property of *The Learners Lab*) of Support Partner organizations identified by need and specialty that will be matched up with *the Foundations Fiscal Sponsorship Awardees* and aligned with Foundation Programs based upon product or service need

This RFA will result in a **Closed Vendor Resource Pool (CVRP)** proprietary to *The Foundation*, eliminating the need to issue RFPs in the future. When the need arises, we will simply connect our Fiscal Sponsorship Awardee with the Foundation Support Partner most closely matching their need and present the Foundation Support Partner with a Project Scope & Statement of Work to review. Then we will come together for introduction, have each party confirm the terms, and launch the engagement. This in effect will transpire over a 24-hours period rather than a few weeks or months of the traditional solicitation life cycle.

Your application package should include the following:

- Executive Summary
- Q&A
- References, Team Information
- *NDA in lieu of Letter of Intent to Submit (Optional)*

In appreciation for your commitment, applicants selected as Foundation Support Partners will enjoy access to all the donated and discounted products, services, and affiliate benefits *The Foundation* has, is currently developing, and is planning for its Awardees and VPL patrons.

For example, we just launched an affiliate discount program featuring a heavily discounted imaging design & editing tools. We also have a relationship with a major OEM Manufacturer for its computing equipment, a financial services provider for price points for discounted business loans even a start-up can manage, and with another financial services entity to offers credit card transaction processing low enough to make your mouth water. Two of these programs are new to the DC and east coast markets and are available exclusively thru *The Learners Lab*.

*The Foundation* is trying to do to establish a really cohesive support system of virtual and brick-n-mortar resources. In addition to benefiting from direct access to the growing portfolio Foundations patrons, customers, awardees and programs, you can look forward to more benefits from partnering with us to serve new tax exempts and the workforce community at large.

## EVALUATION

*The Foundation* is poised to attract a significant number of stakeholders it will serve. Those stakeholders will typically fall into one of following four (4) groups:

- fiscal sponsorship applicants & awardees of *The Foundation*
- young tax exempt reaching out for assistance who are not part of the Foundation Fiscal Sponsorship Program
- program patrons (members, trainees)
- employer customers (requiring custom solutions for executive coaching, credentialing & CEU programs/tools)
- corporate partners (businesses & employer who establish training and training orientation programs made available thru *The Foundation*)

*The Foundation* will review your response to this RFA based on but not limited to the following:

- a) Completeness of RFA and timeliness of submission,
- b) Demonstration of how communication with is managed regardless of stakeholder,
- c) Detailed explanation of business services, discounted & non-discounted costs, donated services, planning & strategy regarding your project & product management with our awardee, and the experience of firm as well as the responsible parties who will serve our awardees directly,
- d) Determine how clearly the following components are articulated:
  - business,
  - communication practices
  - data security,
  - flexibility in offering discounted and donated price points
  - risk management and compliance practices,
  - talent management, internal professional development, use of contingent talent
- e) Experience serving customer in an all or mostly virtual relationship,
- f) Gauge the interest of grant writing, fundraising and other key speciality business professional in becoming a Supporting-Partner to our Fiscal Sponsorship Awardees, and the willingness to discount and donate support services to our start-up awardees,
- g) How internal controls are developed and deployed with regard to confidentiality, timeliness & other factors,
- h) How the discount and pricing models supports start-up entities, the Foundation *Fiscal Sponsorship Awardees*,
- i) Whether you are a grant writer, fund-raising professional or not, please explore how deliverable request would be addressed by your firm. For example, deadline for a recent \$100,000 The MacArthur Foundation campaign required a short video as part of the grant submission package. So if you are a grant writing, marketing, or video production professional, how would you work to accommodate this requirement for a customer where this is totally out of their comfort zone?

- j) Willingness to include branding or co-marketing of your support partnership & services and use of your logo for *The Foundation's* branding and co-marketing as a supporter of its Fiscal Sponsorship Program (see below).

## RFA SUBMISSION CRITERIA

In submitting your Application Package, assure it fully complies with the instructions provided and information requested. Omissions or incomplete information may cause your RFA to be disqualified from further consideration. **Please do not include brochures, pricelists, sales & marketing tools or any other materials not specifically requested. They will not be considered, and may result in disqualification of your application.** Use of those materials will be helpful at a later date as information for an Awardee or for inclusion as information for a Foundation Program.

**Completed** applications will be accepted thru midnight on the aforementioned deadline date. **ALL RFAs must be submitted in PDF format with the signature of the appropriate principal clearly visible on the both the cover letter to the application package, and the Executive Summary page of the Application. Applications will only be accepted by Email.**

**Late submittals will not be accepted unless an extension has been issued!**

### EXECUTIVE SUMMARY

In addition to the query responses, your Application Package must include the following as its Executive Summary:

1. **Profile** – A profile of your company, including description of business history, objects, and articulate the type of clients you've served
2. **Project Staffing** – Provide a bio of qualifications and experience of staff who will be the Point of Contact (POC) for this partnership, and whomever you will task with helping our awardees.
3. **Portfolio Samples** – Please provide brief examples of your most engagements, a complex, intricate, or challenging project, how you managed the challenge, and what the result(s) were. Keep it as brief as is necessary to convey the project, story, and its outcome. For example, if you are a grant/fundraising professional, kindly explore examples of development/grant writing challenges in terms of what they were, and how you ultimately helped the customer achieve its goal(s).
4. **Pricing Model** -- Please provide a [very] rough guesstimate of your pricing model and how it's broken out. For example, do you need to line item anything, are billing/service statements detailed, itemized, or summarized. *This will help respond to inquiries from fiscal sponsorship awardees and alert them learning the variables in line item statements, and how line item requirements must be factored in when conducting their fundraising and pricing their business or programmatic service.*
5. **Professional Development** -- Describe your organizations professional development strategy -- what continuing education requirements do you have or and require as a baseline for so that staff capabilities keep up with unique or changing needs that may be out of your niche area. Much of our work will be developing first ever and/or unique/proprietary products, services, program, or tools, **PLUS** doing the same for our awardees, employer customers. *(For example, developing credentialing programs, member CE programs, etc... So we want to see where this is doable or not possible to more accurately match up with an awardee, program, or customer. Again, no right or wrong answer).*
6. **Time Management** -- Outline your time management preferences – include things like a) our office does not do overtime, so no weekends/holiday work, or b) our writers work remotely and manage their own

schedules, so we can accommodate evening, weekend, or holiday updates/changes should change occur that would affect a campaign in progress.

7. **Linguistic Services** – Are you open to multi-lingual engagements? If so, please indicate what language other than English you can accommodate.
8. **Terms** – Please indicate how the *Terms & Specs* of your typical contract are presented. For example, if you have an ongoing relationship with a customer, do you prefer a proposed start date for each engagement, another type of communication, or a relationship where you employ engagement or project planning roadmaps that indicate current plus future or planned projects and their projected time lines. We're trying to determine how you work, advance plan so that we can convey & advise the awardee, and support you where needed.
  - a) What are your cancellation of agreement/contract parameters,
  - b) What other factors would an awardee, program officer, or customer need to consider should funding, leadership changes or other unforeseen events trigger such a modification or cancellation decision.
9. Any other information that you as the Vendor believe will assist us in assessing how to match you with an awardees need.

## Q&A

### WHY A PARTNERSHIP GROUP INSTEAD OF SOLICITATIONS?

In an effort to streamline the review process, we decided to use a Q&A process in order to help qualify partners and successfully match with a Foundation Awardee or Program. Understand there is no correct or incorrect answer. This is merely a tool for assessing how to *match* given the parameter of awardees we've already had, and those that are projected based upon inquiries and applications received.

### HOW WILL THIS WORK?

Foundation Support Partner will be matched with Fiscal Sponsorship Awardee or a Foundation Program based upon the specific need and/or operation in play. If there are additional queries you have for us, kindly submit them in writing before the deadline, we will happily address them and publish our response on our website and time permitting, other venues where the original RFA was published.

The Q&A covers the three main (3) categories of services for which we require partner: Grant Writing/Fundraising (GWF), Web Development (WebDev), & Specialized Business Services (SBS).

The Specialized Business Service category would include some of the following, so please respond as the query applies to your business, product, and or service:

- App Development
- Audio/Video Production
- Location & Other Real Estate Needs
- Media Disposal, Storage, & Compliance
- Publishing, Print & Document Binding Services
- Technology Infrastructure Services
- Venue Space Rentals (until our brick-n-mortar complex is built)



**Q&A: IT'S ABOUT YOU**

Kindly answer the follow queries as it relates to your business in a separate document. If the query or scenario does not apply, simply indicate N/A.

- 1) Do you (or your organization) currently have, or have pending any arrangements (for example, contracts and cooperative agreements, grants, etc.) awarded, administered, or funded wholly or partly any other Fiscal Sponsoring or Grant Giving commitment that would prevent you from parting with *The Foundation* and serving as a Foundation Support Partner to our Fiscal Sponsorship Awardee?
- 2) Do you (or would your organization) have any experience in undertaking initiatives for complex, highly confidential projects that may result in new innovations or technologies, or extremely high profile relationships?
- 3) Does your organization directly or indirectly deliver products or services to business in foreign countries? *The Foundation* does not entertain Fiscal Sponsorship applications or inquiries for assistance to find fiscal sponsorship opportunities UNLESS it is a US entity doing or planning to do business in the United States, the extra-state jurisdiction, the Department of Defense and the District of Columbia. Will you be able to partner with us and not create a conflict of interest for your business?
- 4) Does your organization have a direct or indirect relationship (financial, organizational, contractual, or otherwise) with any business entity which would be affected in any way by proposed support to one of our awardees? For example, are you supporting or engaging another organization who offers fiscal sponsorships, where a relationship with *The Foundation* might adversely impact or compromise that. (We are looking to avoid creating a conflict of interest)
- 5) If yes, indicate the nature of your relationship and how it would be affected by the proposed work, and what can be done to mitigate anything adverse.
- 6) Provide examples of how you (or your organization) manage and plan the management of private business/government data/information acquired during in the performance of your work, or in preparing for proposed work. Feel free to use the following examples or provide your own:
  - Confidential and proprietary data of other stakeholders and or clients/customers of the entity you are serving?
  - Data generated for, during, or as a result of a honoring a contractual obligation?
  - Government or non-government organizational plans and programs?
- 7) What type(s) of services or products your firm offer?
- 8) Do you develop/design customized solutions? If so, please share some examples.
- 9) Are you willing to donate or discount any of your services? If so, please itemize using the format below. (Feel free to extend this table to add more products or services, it's not fixed sized.)

Product/Service Type	Donated (Y/N)	Discounted (Y/N)	Price Point vs. Discounted Rate (indicating a range is fine)

- 10) What do you (or what clauses does your organization) craft in order to avoid a possible organizational conflict of interest?
- 11) Will your organization make use of an affiliate organization, consultant, temps, interns, apprentices or subcontractor in delivering your products and or services? If yes, explain in what manner.
- 12) Explain how your firm will identify and access potential sources of grant funding. Which of these has proven to be the most successful, challenging, or unproven (if any).
- 13) Provide a general idea of how the following services would be delivered to/with the customer:
  - Complete or assist in completions of paperwork associated with grant applications, project documentation, establishing technical resource library, developing marketing materials, etc..
  - Detailed time frame of whole process (a through d) – *for example, if the service is grant writing...what would a time line look like (we ask so that awardees who know nothing about this can be counseled with real time expectations base upon simulations provided by the vendor/business.*
    - a) Funding needs analysis
    - b) Identification of appropriate grant resources
    - c) Grant preparation process
    - d) Develop fundraising/ grant solicitations based on specific need
    - e) Grant review and approval process
- 14) Do you conduct a Funding or Service Needs Analysis (FNA) and if so, how you do it, how do you categorize your findings then convey the importance of that to your customer?
- 15) Help establish a development department, protocols and operational standards for awardee clients should include reporting, time and time table management, quality control and auditing, record keeping, and other services as deemed necessary
- 16) Indicate what locale/geographic area(s) you or your company would be willing serve (local to your location, location to your region, within your state, nationwide, virtually). We ask because our stakeholders are nationwide, not just in the DC/Mid-Atlantic Region.
- 17) Perform project tasks and program management oversight for development life cycle, including the submission of supporting documentation with grant applications or web development, migration, redesign, app development thru deployment, etc...
- 18) Self-Assessment Overview
- 19) Do you provide potential funding opportunities summaries, profiles, or lists
- 20) Provide a summary detailing 3 misses you had and indicate how you corrected them for a success.
- 21) Provide summary detailing 3 of your greatest successes, are or have you been able to replicate this with subsequent engagement or certain types of engagements?
- 22) Provide summary outlining campaigns, projects, programs, engagement that returned unexpected results. Please articulate what they were, why it was unexpected, and what the outcome was for you and your customer, and was there a learning curve. Would you entertain another of similar challenges?
- 23) Research potential grant opportunities
- 24) Template library development containing all the key components for putting together fundraising and grant solicitations

## REFERENCES & SUBMISSION

### REFERENCES

Provide information on related experiences with other tax exempts or foundations.

- Include three business references and 3 customer references.
- Any preferred services for which you would like to volunteer, please feel free to indicate.
- If this would be your first partnership, indicate what factors inspired your consideration of it and why.
- While not required, feel free to present a letter of intent to respond, no deadline required but as a courtesy for our review planning, kindly do so at least a week before the RFP deadline.

### YOUR KEY PERSONNEL, CONTACTS, AND STAFF

Please provide a list with brief 2-3 para bio of your key personnel, the primary point of contact(s), and any other members of your team you feel are essential.

### SUBMISSION AND CONTACT INFORMATION

Parties interested in joining the *Foundation Support Partners (FSP)* as outlined above should submit their RFA package no later than midnight on **June 4, 2017**.

RFA Response Packages should be submitted by email to:

**Proposal Review Team**  
**ATTN: RFA -- Foundation Support Partnerships (FSP)**  
**The Learners Lab (TLL)**  
**Proposals@TheLearnersLab.org**

**NO HARDCOPIES | NO CALLS PLEASE**  
**ELECTRONIC PDF SUBMISSION ONLY, THANK YOU.**

## NON-DISCLOSURE ACKNOWLEDGEMENT AND RFA ACCEPTANCE

RFAs submitted to *The Foundation* will become the sole property of The Learners Lab.

*The Foundation* reserves the right to accept or reject any or all RFAs; it also holds respondents to the same level and class of confidentiality and non-disclosure standard.

All respondents agree that rejection shall create no liability on the part of *The Foundation*, any Awardee, or any Representative of The Learners Lab because such rejection or the filing of any document in response to this request shall not constitute an agreement of any kind. The respondent respects said conditions, to include retaining in confidence any and all information and communications pursuant to this RFA or its review process AS no such agreement has been offered, inferred, or enforced by or on behalf of The Learners Lab.

The Learners Lab will be the sole judge for determining the viability of a given Vendor/Business's inclusion as a Foundation Support Partner whether presenting to their Awardee or utilizing for/in conjunction with its own Programmatic activities. If the Vendor fails to meet the agreed to expectations or requirements, *The Foundation* or the Coordinating Representative will notify Vendor via email & direct call to advise the Vendor and allow the opportunity to address the situation.

To be clear, there is no expressed or implied obligation on behalf of the Learners Lab on behalf of their awardees, or program stakeholders to entertain any action, further action, to invite further action, or to reimburse firms/consultants/individuals presenting an RFA for any expenses incurred in preparing or presenting their information in response to this published request for applications.

**The Learners Lab (TLL)**

If you or your organization intends to submit an application and would like present an Letter of Intent, in lieu of the LOI, feel free to initial, sign, PDF this NDA and return via email the Proposal Review Team

\_\_\_\_\_  
NDA Acknowledged by (Initials)

\_\_\_\_\_  
Signature / Date

Submit RFA NDA & Letter of Intent to:

**Proposal Review Team**  
**ATTN: RFA LOI**  
**The Learners Lab (TLL)**  
**Proposals@TheLearnersLab.org**