

Request for Qualifications Workforce Development / Labor-Management Partnership

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Section A: Introduction and Background Information

The Transportation Learning Center (Center), located in the Washington, DC metropolitan area, seeks consultants to assist in its work of developing and supporting local, state and regional labor-management transit training partnerships.

Transit faces a severe skills shortage. Major contributors to the skills shortage include:

- An aging workforce. Studies indicate that in the next five years, nearly half of current skilled maintenance workers in transit will be eligible for retirement
- New technology. Buses, subway cars and light rail vehicles all rely on increasingly complex electronic systems. Training of current workers has lagged behind the implementation of these technologies
- Growing demand. Transit ridership is growing fast and 2007 saw transit reaching levels of ridership not seen in 50 years. With increasing gasoline prices, growth in transit ridership will continue, and the demand for skilled workers to keep the systems running effectively will also grow

To address this skills shortage, the Center developed the Transit Technology Career Ladder Program. In conjunction with local transit agencies and their unions, the Center helps develop and support transit training partnerships. These partnerships, practicing data-based decision making, train current mechanics to an expert level. Career ladders help lesser-skilled workers move into the mechanical trades. The partnerships can also reach out to local high schools, community colleges and workforce boards to develop a pipeline for future workers coming into transit careers that provide good wages and excellent benefits.

More information on the Center and on the Transit Technology Career Ladder Partnerships is available on our website www.transportcenter.org.

Section B: Scope of Work Requested

For assistance in this work, the Center requires individuals or organizations to have demonstrated experience in working with labor and management to address training and workforce development. Experience in transit is also desirable.

The needed skill sets for potential consultants include:

- **Excellent writing skills.** All consultants will need to write regular reports detailing the progress of their work. In addition, consultants will need to draft letters and funding proposals to assist local partnerships in securing funds for training
- **Organizational and group process skills.** Working with local partnerships requires an ability to work with different levels of leadership in both the management and the union. In sometimes contentious situations, identifying and building upon points of agreement will be key to starting the partnership. Organizing productive meetings of top policy makers and of working committees will also be necessary. An ability to identify and mentor individuals from both management and labor who can help champion the partnership is also essential
- **Information technology skills.** Lots of communication takes place by electronic mail, and a lot of research needs to be conducted on the world-wide web. Familiarity with and competence in Word, Excel and PowerPoint is required.
- **Demonstrated experience in working with labor and management.** Building and sustaining these partnerships requires an ability to understand the needs of both management and labor. Respondents to this RFQ must show a track record of working with labor and management on issues related to training.

In addition to these needed skills, the Center seeks consultants who can add value in one or more of the following areas:

- **Transit technology.** As noted above, advanced technology is one of the main drivers in the skills crisis. Consultants who can demonstrate their understanding of these technologies can provide critical assistance to local partnerships and to the Center directly.
- **School to work programs.** Transit has been less involved than many other sectors in reaching out to young people as potential workers. Transit offers good pay and excellent benefits. An ability to adapt lessons from other

sectors in developing the school to career pipeline for transit would also aid the local partnerships and the Center.

- **Recruitment of non-traditional populations.** Many adults can also be good potential recruits for transit careers. Again, other sectors have experience in recruiting women, for example, into non-traditional jobs. Translating that experience into the transit context also aids the local partnerships and the Center.

Section C: Selection Criteria

The rating process will consist of a three-tier system based on the qualifications submitted that are similar to or the same as those specified in the **Scope of Work Requested** section, mentioned above. The rankings are as follows:

- Outstanding
- Satisfactory
- Unsatisfactory

Section D: Submission Requirements

This Request for Qualifications is open on a rolling basis beginning September 29, 2008. Submissions will be accepted continuously, beginning October 13, 2008. The Center reserves the right to announce a closing of the process at a later date. Such announcement will be made on the Center's website, www.transportcenter.org

Statements of qualifications will be reviewed as business needs of the Center dictate.

Contractors accepting work with the Transportation Learning Center acknowledge that none of the work assigned will be subcontracted without prior, written approval from the Center.

All potential consultants should provide the following information.

- Name, place of business, if applicable, and business status of the responding organization
- Resume/and or Resumes of key project staff
- A brief statement of qualifications based on the scope of work requested, not to exceed 1000 words
- References
- Required attachments
- A financial proposal estimating how much the work specified would cost, including an hourly rate and day rate for your services

Qualifications will be accepted in hardcopy or in electronic medium accessible by PDF or Microsoft Word (2003 compatible), and may be submitted to the following addresses:

Transportation Learning Center
Attention: RFQ Process Committee
8403 Colesville Rd. Ste. 825
Silver Spring, MD 20910

info@transportcenter.org
subject line: ATTN: RFQ Application

APPENDIX: Center's Travel Policy & Procedures Manual

The Transportation Learning Center has developed this travel policy with three primary goals in mind:

- To make travel reservations promptly, in order to reduce the cost of travel when possible.
- To ensure that employees know what expenses are allowable and how to be reimbursed for expenses when necessary.
- To allow the Center to file timely invoices with its funding agencies based on prompt submission of travel reports and supporting receipts.

Part 1 – Pre-Travel Approval Process (Center Staff and Contractors)

All Center staff and contractors traveling more than 15 miles from the Center or the contractor's home (whichever is closer to the destination) must go through a two step process for approval.

1. Contractor will email their supervisor within 21 days of travel date requesting travel. The email should include date of departure and return, grants to be billed, and purpose of travel.
2. Supervisor will reply to contractor and Travel Coordinator that travel is approved or denied.

This written documentation will become part of the contractor's expense report.

Part 2 – Pre-Travel Coordination Process

Center contractors may book their own travel or request the assistance of the Travel Coordinator. If they choose to make their own travel arrangements, contractors must notify the Travel Coordinator of their travel plans when travel is booked. Travel should be booked as early and as cost effectively as possible. If the contractor chooses to have the Travel Coordinator book travel, then the process below must be followed:

1. Travel Coordinator will confirm dates of conference/meeting attendance and email proposed travel arrangement to the contractor for approval (as necessary).
2. Contractor will reply via email to confirm/approve proposed travel reservations.
3. Travel Coordinator will finalize booking arrangements.

*Rebooking of travel after approval/confirmation will be done **only** if an additional trip has been added immediately prior to or after the original travel dates.*

Part 3 – Cancellation/Changes of Accepted Travel Arrangements (Center Staff & Contractors)

When travel has been approved by the supervisor and travel arrangements have been approved by the traveler, it is the traveler's responsibility to cancel or change all of the arrangements. This includes but is not limited to: Airlines, train, rental car, hotel, and conference registration. In addition, the Travel Coordinator and the supervisor must be notified by either phone or email of all changes. The Travel Coordinator may assist with changes or cancellations, if requested in advance by the Traveler.

Unallowable Changes – The cost of changes made due to personal preference with no reasonable savings of time to justify employee cost, or missing transportation due to poor time management skills will be charged to the employee or contractor.

If the traveler is ill or has an emergency, it is the responsibility of the traveler to cancel or change all hotel/air/train reservations and notify the Travel Coordinator. The Travel Coordinator can assist in cancellations or changes if notification is received either by phone or email prior to the time of travel departure.

Part 4 – Time Recording When Traveling (Center Staff & Contractors)

Travel time and expenses begin when an employee leaves either their home or the Center (depending on where they are located when travel begins). Time spent traveling is to be billed.

A trip that will be split between two locations and two separate contracts should be split within each day of travel. The travel time to the first location should be billed under contract one. The travel time from location one to location two should be split between the two contracts, and the travel time back from the second location should be billed to the second contract.

When in the travel location, the day starts when the normal workday starts. If there is a working breakfast, working time starts with breakfast. If there is a working lunch or dinner, time recorded should include that as well. A working meal is considered to be a meal where the employee's presence is mandatory.

Breaks to go on non-work related excursions are not to be included in the timesheet for that day. Breaks to contact the Center's office or check e-mail are considered work related.

If a trip is partially business and pleasure to the same location, the traveling time should be on your timesheet on the actual days of travel. The traveling time is still considered work time.

Part 5 – Approved Travel Expenses Incurred by Employee (Center Staff & Contractors)

All staff and contractors of the Center are strongly encouraged to secure the most economical means of travel. This will usually involve at least a three-week advance booking for airlines and hotels. In all cases, the booking of travel should be made as early as feasibly possible. Excess costs due to unnecessarily late bookings may be questioned by the Center.

If an employee books his/her own travel, then the responsibility for filling out the travel form for pre-travel expenses falls to the employee.

Forms & Receipts (Center Staff & Contractors)

It is the employee's responsibility to fill out the Center's expense form that details the expenses. These expense forms must include the following: Employee name, date of travel, time that travel began and ended, reason for the travel, proper billing of travel, amount of the charge, and backup for the charge. Reasonable care must be taken that all receipts are accounted for and are enclosed.

Any receipt under \$50 that is unavailable will be reimbursed if the following is provided: date of charge, reason for charge, amount of charge, vendor. If/when the receipt is located; it should be filed with the appropriate expense reimbursement report. Unavailable receipts over \$50 will be paid at the discretion of the Center's Director.

Part 6 – Travel Expense Reimbursement (Center Staff & Contractors)

The Center follows the government policies and procedures for travel reimbursement. Both costs and time in travel must be justified as reasonable. The current per diem and mileage schedules are found at their website (www.gsa.gov). The Federal government updates its per diem annually on October 1 and the Center follows these updates.

Mileage for business travel in your personal auto is calculated on actual miles at the government mileage rate. Meals and incidentals are calculated on the Federal per diem rate in each individual locality.

If the cost of lodging within a five mile radius of the destination exceeds the government lodging rate, the difference between the actual rate and the government lodging rate is considered an "unallowable" cost. In the event that lodging exceeds the government lodging rate, **supervisor permission must be granted in writing before booking. No unallowable costs will be reimbursed by the Center without advance approval.** This written approval will be included in the expense report documentation.

A starting point for locating hotel rooms at the government rate is: www.fedrooms.com. Travelers are not limited to a certain website or company when booking travel, particularly if a lower rate can be found at a competitor's website.

Reasonable tips for skycap, maid and bellman are not part of the per diem for the day. These costs are reimbursable and must be reported under tips, with the type of tip specified in the expense reports. Under government contracts, alcoholic beverages are not reimbursable costs. These costs must be treated as "unallowable" costs. Separate bills should be used and paid personally by the employee.

All expense reports should be turned into the Travel Coordinator.

Per Diem (Center Staff & Contractors)

The Center follows the Federal guidelines for per diem. These are listed online and can change without notice. The Center will do its best to notify employees when changes occur.

Per Diem amount will be determined by the city to which you are travelling; specifically, following the government guidelines for each locality. If you are traveling to multiple cities with multiple rates, Per Diem should be calculated according to the below tables.

The "incidentals" cost of the per diem applies to travel longer than 24 hours in duration.

Partial Day Per Diem Calculation Table:

Times of Day	Meal to be reimbursed
12 am – 10 am	Breakfast
10 am – 2 pm	Lunch
2 pm – 9 pm	Dinner
9 pm – 12 am	Dinner

Per Diem Calculations per Federal Guidelines as of October 1, 2007:

Expenses	\$39	\$44	\$49	\$54	\$59	\$64
Breakfast	7	8	9	10	11	12
Lunch	11	12	13	15	16	18
Dinner	18	21	24	26	29	31
Incidentals	3	3	3	3	3	3