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# REQUEST FOR PROPOSALS

**Seeking: Instructional Design Consultant**

**Topic: Elevate ALICE Certificate Curriculum**

**United Way of Northern New Jersey & United Way Battle Creek and Kalamazoo Region**

**Applications Due: January 5, 2022 by 11:59pm EST**

## Summary Information

**Project Title:** Elevate ALICE Certificate Curriculum and Materials Design

**Proposal Due Date and Time:** Wednesday, January 5, 2022 by 11:59pm

**Selection Announcement Date:** Mid-late January 2022

**Estimated Period of performance:** February-March 2022

**Maximum Funding Amount:** \$20,000

**Project Owner/Source of Funding:** United Way of Northern New Jersey and United Way of Battle Creek and Kalamazoo Region

**Point of Contact for Questions:** Michelle Roers - Michelle.Roers@UnitedWayNNJ.org

## Purpose

United Way of Northern New Jersey (UWNNJ) in partnership with United Way of Battle Creek and Kalamazoo Region (UWBCKR) are seeking a qualified consultant to provide instructional design standards for training materials related to the Elevate ALICE Certificate Curriculum, including a slide deck, learning activities, video scripts, case studies, job aids, and guidebook. Adaptive leadership principles should be considered when designing this curriculum. The consultant will engage with the UWNNJ and UWBCKR staff and work closely to develop design materials that align with United Way and United For ALICE marketing/branding standards. Consultants must have adult learning experience designing training materials, preferably for business owners, senior level organization leadership, and human resources professional audiences.

## Overview

**ALICE®**, an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, is a way to define households with earnings above the Federal Poverty Level, but that cannot afford the essentials needed to survive. Despite working – often at more than one job – these individuals and their families are forced to make impossible choices such as deciding between quality child care or paying the rent. With no savings in place, they are constantly vulnerable, always just one crisis away from financial disaster. Formed in 2018 by United Way of



[UnitedWayNNJ.org](http://UnitedWayNNJ.org) | [@UnitedWayNNJ](https://twitter.com/UnitedWayNNJ)

We believe that by securing racial and economic equity for ALICE® we can improve life for all.



United Way of the  
Battle Creek and  
Kalamazoo Region



United Way  
of Northern New Jersey

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Northern New Jersey, the ALICE Action Network brings together invested business professionals from a variety of industries to discuss challenges confronting ALICE households and to determine ways to address these challenges. Network members share, brainstorm, and promote strategies to elevate ALICE in the workplace. The overall goal is to improve life for low-income (ALICE) workers, customers, and partners throughout the state while supporting businesses. More information on ALICE can be found at [UnitedForALICE.org](http://UnitedForALICE.org).

United Way of the Battle Creek and Kalamazoo Region has long partnered with the non-profit and for-profit sector around philanthropy and social change. In an effort to provide additional support to their partners and to further improve conditions for ALICE households in their region, UWBCKR is committed to providing education, awareness, and development to Elevate ALICE. Through the partnership with UWNNJ and the ALICE Action Network, UWBCKR will be better positioned to provide additional benefit to our workplace partners and an opportunity to influence an important contributor to the success of ALICE – employment.

With support from institutes of higher education, educational consortiums, professional and business associations, UWNNJ and UWBCKR are developing a curriculum and support materials for a multi-day leadership course to be delivered virtually until such a time as it is safe to convene groups in public, at which point we may transition to a hybrid-virtual and/or in-person model. The leadership curriculum is based in the principles of Adaptive Leadership and blends other leadership tools and theories to support leaders in building awareness of ALICE and assessing their own workforce strategies to elevate this demographic. Course participants will plan and take action to make progress on their workforce strategies plan. They will participate in a workplace assessment to benchmark their standing with their ALICE population. The curriculum design phase has included the development of materials to support the leadership learning journey. This design project will result in final draft materials to be used in a pilot of the Elevate ALICE Certificate Curriculum which will be launched during the second quarter of 2022. The materials that need to be designed within the scope of this project include:

1. Instructor's Guide/Manual (i.e. the curriculum)
2. Participant guidebook including course outline, guidelines, and associated worksheets
3. Slide deck
4. Learning activities (to accompany training modules)
5. Video scripts (to support Workforce Strategies and general content)
6. Case studies (approximately 10 total - 2 per Workforce Strategy)
7. Tools & Take-aways (Job aids)

The foundations of our work to Elevate ALICE in the workplace can be found here: [WorkforceStrategies.UnitedWayNNJ.org/](http://WorkforceStrategies.UnitedWayNNJ.org/)

## Eligibility

Instructional Designers with demonstrated adult learning experience in producing training materials for an audience inclusive of business owners, senior level organization leadership, and human resources professionals. Individuals who have the proven ability to determine appropriate learning methodology to:

1. define and document learning objectives
  2. conduct research and collaborate with subject experts
  3. design content for adults to optimize learning
  4. generate the layout of the learning supports
  5. redesign content to ensure it matches the learner's needs
  6. create visual, audio and interactive tools
  7. work closely with a project development team who is contributing to the content.
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The Elevate ALICE project is dedicated to building capacity and accountability into policies, practices, and partnerships through collective collaboration with communities most affected by inequities. It is requested that the Instructional Designer share this commitment and values in their work and throughout the project.

## Funding Overview and Timeline

UWNNJ and UWBCR will issue an award of **up to \$20,000** in the form of a fixed-priced contract. Applications must be submitted by **January 5, 2022, at 11:59pm EST** and selections will around mid-late January 2022. The project period shall begin upon both parties' full execution of the contract and will end in March 2022.

Selected consultant will enter into a contract with UWNNJ and UWBCR to complete the deliverables specified in the application. UWNNJ will disburse funds according to completion of the assigned deliverables. The entities will provide a payment schedule in accordance with the assigned completion percentage. Please note: UWNNJ and UWBCR reserves the right to make changes to the project timeline and payment schedule if necessary.

## Activities and Deliverables

The Instructional Design consultant will design a course curriculum inclusive of an Instructor's Guide/Manual (i.e. the curriculum), participant guidebook including course outline, guidelines, and associated worksheets, slide deck, learning activities (to accompany training modules), video scripts (to support Workforce Strategies and general content), case studies (approximately 10 – 2 per Workforce Strategy), and Tools & Take-aways (job aids).

### Scope of Work

The selected consultant will be expected to undertake the following tasks:

- 1. Meet with Elevate ALICE Curriculum project team and review existing content materials**
  - a) Orientation to the project (ALICE, curriculum and materials design)
  - b) Review and discuss outline for curriculum session modules format and materials
  - c) Assess and determine project needs
  
- 2. Provide instructional design for curriculum and materials**
  - a) Provide intermittent drafts for the project team to review and comment
  - b) Make revisions and edits as determined by project team
  - c) Deliver final curriculum and materials that include directions and guidelines for audio and visual technical functions and printing materials with printing directions and guidelines

### Deliverables

Selected Instructional Design consultant will enter into a contractual agreement with UWNNJ and UWBCR to complete the deliverables specified below. UWNNJ will disburse funds according to completion of the assigned deliverables. UWNNJ will provide a payment schedule in accordance with the assigned completion percentage. Please note: UWNNJ and UWBCR reserves the right to make changes to the project timeline and payment schedule if necessary. The following outlines the deliverables to be produced by the consultant; however, a finalized scope of work will be agreed upon post consultant selection.

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Primary Task/Deliverable	Documentation	Payment Schedule
Meet with the project team. Orientation to the project. Review and discuss outline for curriculum. Assess and determine design needs.	Meeting minutes and design plan	10% of funding Date TBD via contract
First submission of draft materials for the project team to review and comment. Meet with project team/leader. <ul style="list-style-type: none"> <li>• With revisions and edits to follow</li> </ul>	Draft materials  Notes for design of curriculum materials	25% of funding Date TBD via contract
Second submission of draft materials for the project team to review and comment Meet with project team/leader. <ul style="list-style-type: none"> <li>• With revisions and edits to follow</li> </ul>	Draft materials  Notes for design of curriculum materials	25% of funding Date TBD via contract
Deliver final curriculum and materials	Final curriculum and materials that include directions and guidelines for audio and visual technical functions and printing	40% of funding Date TBD via contract

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## Key Dates

Event	Date
Release of RFP	November 2, 2021
Questions and Answer period	November 2, 2021 – January 5, 2022
Deadline for Application submission Application period closes	January 5, 2022
Anticipated notice of award	Mid-late January 2022
Contract execution	February 2022
Design of curriculum materials Meetings with project staff Intermittent submission and review of draft materials <ol style="list-style-type: none"><li>1. Instructor's Guide/Manual (i.e. the curriculum)</li><li>2. Participant guidebook including course outline, guidelines, and associated worksheets</li><li>3. Slide deck</li><li>4. Learning activities (to accompany training modules)</li><li>5. Video scripts (to support Workforce Strategies and general content)</li><li>6. Case studies (approximately 10 total - 2 per Workforce Strategy)</li><li>7. Tools &amp; Take-aways (Job aids)</li></ol>	February through March 2022
Final materials due	March 2022

## Product Ownership Resulting From This Work

United Way of Northern New Jersey and United Way of Battle Creek & Kalamazoo Region (Owners) will jointly own the exclusive right to the materials produced as part of the Elevate ALICE Curriculum. Ownership of all data, materials and documentation originated and prepared for the owner's pursuant to this contract shall belong exclusively to the owner. All data, reports, computerized information, programs and materials related to this project shall be delivered to and become the property of the owners upon completion of the project. The contractor shall not have the right to use, sell, or disclose the total of the interim or final work products, or make available to third parties, without the prior written consent of the owner. All information supplied to the owner may be required to be supplied on USB flash drive media or cloud platform compatible with the owner's computer operating system.

The owners shall retain all of its rights and interest in any and all documents and property, both hard copy and digital furnished by the owners to the contractor for the purpose of assisting the contractor in the performance of this contract. All such items shall be returned immediately to the owner at the expiration or termination of the contract or completion of any related services, pursuant thereto, whichever comes first. None of the documents and/or property shall, without the written consent of both owner's, be disclosed to others or used by the contractor or permitted by the contractor to be used by their parties at any time except in the performance of the resulting contract.

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# Requirements For Financial Award

## Allowable Expenses

Funds are to be used exclusively for professional time spent on the creation of instructional design curriculum and material for **Elevate ALICE**.

## The following items are not allowable expenses:

- Bad Debts
- Contributions and donations
- Entertainment Costs
- Equipment purchases
- Fines and penalties
- Food and Alcoholic Beverages
- Goods and services for personal use
- Lobbying
- Losses on other awards
- Transportation

## Period of Performance

The targeted completion of work shall be February 28, 2022. Modifications to this timeline will be determined as the work progresses.

It is the intention of UWNNJ and UWBCR to utilize the curriculum materials in a pilot course within the second quarter of 2022. Should the outcome of the pilot course determine the need for modification to the course structure and materials, UWNNJ and UWBCR may consider entering into a subsequent contract to fulfill the needs of the project.

## Proposal Response

### Proposal Response Format

In order to be considered for this project, proposals must be in PDF format, including the following:

- 1. Applicant information/Cover page** (Not included in page count)
    - a. Organization Name, Street Address, City/State/Territory, Zip
    - b. Lead project contact (person/agency-designated project contact for all matters pertaining to the project): Name, email, phone
    - c. Lead finance contact (person/agency-designated finance contact for all matters pertaining to processing contracts and invoices): Name, email, phone
  - 2. Project narrative** (not to exceed 5 pages) that includes:
    - a. A description of the methodology proposed to meet each of the deliverables listed above.
    - b. A capability statement that demonstrates the consultant/organization's experience and ability to deliver subject matter expertise in the identified content areas.
    - c. A description of any other consultants/firms that will be engaged on this project and their relevant expertise.
    - d. The name of the primary staff and other significant contributors, including qualifications and role. (Resume/CV not included in page limit)
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3. **Line-item budget (Excel document) and narrative**, not to exceed \$20,000:
    - a. Budget proposal and accompanying budget narrative that explains each line-item, including the cost breakdown and justification as to how it will support project goals and objectives.
    - b. Funding restrictions specified in the Contractor Agreement. See above list of non-allowable expenses.
  4. **Examples of work** or links to a portfolio

## Selection Process

Each proposal will be reviewed and rated on the following elements:

1. **Understanding of Project Purpose and Goals:** Applicant has a clear understanding of the project goals and deliverables.
2. **Relevant Personnel Experience:** Applicant has clearly documented evidence of his/her (and that of the proposed project staff) instructional design experience, adult learning, and experience in proposed content areas.
3. **Budget:** The proposal includes a detailed, line-item budget (Excel document) justifying the proposed expenses, and the expenses are appropriate for the purposes of the deliverables.

## Questions

Any questions regarding the process and the project can be submitted to:

[Michelle.Roers@UnitedWayNNJ.org](mailto:Michelle.Roers@UnitedWayNNJ.org)

Submitted questions and corresponding answers will be shared via the RFP posting found at:

[UnitedWayNNJ.org/Careers](https://www.unitedwaynnj.org/Careers). Questions and Answers can be found at the bottom/end of the RFP description. Based on questions received, this will be periodically updated.

## Deadline For Submission

The deadline for submission is January 5, 2022, by 11:59pm Eastern Standard Time.

Proposals should be submitted electronically, in PDF format, via e-mail to:

[Michelle.Roers@UnitedWayNNJ.org](mailto:Michelle.Roers@UnitedWayNNJ.org)

## Notification

Anticipated notice of award to the selected candidates will be mid-late January 2022.

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## Project Contact

Michelle Roers

Senior Director of Strategies for ALICE: United in Care & ALICE Action Network  
United Way of Northern New Jersey

[Michelle.Roers@UnitedWayNNJ.org](mailto:Michelle.Roers@UnitedWayNNJ.org)

Natalie Saucedo

Senior Director of Strategy & Innovation  
United Way of Battle Creek & Kalamazoo Region

[Nsucedo@uwbckr.org](mailto:Nsucedo@uwbckr.org)

## Questions and Answers

Pending submission from applicants, this section will be updated periodically.