

## OSHKOSH REGION DEFENSE INDUSTRY DIVERSIFICATION INITIATIVE

# DEFENSE INDUSTRY SUPPLY CHAIN (DISC) MAPPING & WEB PORTAL CREATION

## REQUEST FOR PROPOSAL (RFP)

**RELEASED 02/17/14**

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### I. Background

#### a. About the Oshkosh Region Defense Industry Diversification Initiative

The purpose of the Oshkosh Region Defense Industry Diversification Initiative (ORDIDI) is to undertake a regional effort to respond to the defense layoffs announced by the Oshkosh Corporation (OC) mainly affecting the “Impact Region” of Winnebago, Fond du Lac, Outagamie and Waupaca Counties in the State of Wisconsin (shown in Appendix A). Technical and financial assistance was requested and received from the Department of Defense, Office of Economic Adjustment (DoD-OEA) by the East Central Wisconsin Regional Planning Commission (ECWRPC) in late 2013 in order to support the region’s efforts to:

1. Engage regional stakeholders on a collaborative, regional response to defense impacts on dislocated workers and the regional manufacturing base;
2. Undertake a planning effort to align existing local and regional economic and workforce development strategies and to embed defense diversification strategies in those aligned plans;
3. Provide outreach and assistance to the ~950 dislocated workers known to be impacted by OC layoffs; and

#### b. About the Oshkosh Corporation Defense Layoffs

In the two rounds of announce layoffs by the OC, the number of employees laid off is estimated to be approximately 950, however, the total number of manufacturing jobs lost from the regional employment base resulted in about 1,200.

For more information on the ORDIDI effort, please refer to Appendix B, the Oshkosh Region Defense Industry Diversification Initiative Fact Sheet.

## II. RFP Purpose:

### a. Creation of the Defense Industry Supply Chain Initiative (DISC) component of the ORDIDI program.

The product of the Defense Industry Supply Chain (DISC) initiative will ultimately be the creation of a web-based directory of Oshkosh Region defense contractors, businesses, and suppliers that is based on substantial research and information compiled during an initial supply chain mapping activity.

There are two primary envisioned uses for the web-based tool: (1) to identify manufacturers and small businesses in the Oshkosh Region (for the purpose of outreach to inquire whether they desire other assistance) impacted by reduced Oshkosh Corporation (OC) production and procurement, and; (2) to help other companies seeking to diversify their supplier base (or those that are just interested in more diverse contracting) identify suitable firms in the Oshkosh Region, and (3) to identify and better align defense suppliers with opportunities that may exist in an expansion of advanced manufacturing opportunities, particularly within the aerospace/aeronautics cluster.

The main users of the tool will be: (a) entities seeking to provide assistance to impacted OC suppliers and businesses, and; (b) companies seeking to diversify their product market or supplier base. .

The Consultant will work with ECWRPC and strategic partners such as the Wisconsin Manufacturer's Extension Partnership (WMEP), as well as regional industry partners and associations, to help identify individuals for a 10 to 20 person Advisory Team that will bring their current expertise, knowledge and resources on the existing suppliers impacted from the Oshkosh Corporation layoffs.

This Advisory Team will supervise the Consultant in order to map the existing defense supply chain assets and build industry market diversity for defense suppliers within the Oshkosh Region. WMEP has already agreed to work directly with the Consultant to identify defense companies in for inclusion in the supply chain initiative.

## III. Scope of Services

The Consultant shall respond to the following three components of the DISC initiative, including a detailed cost-estimate for each component:

### a. Identification and Assemblage of a DISC Advisory Team:

1. The consultant, in collaboration with ECWRPC and WEDC, shall identify specific partners, agencies, organizations, associations, etc. that it intends to work with in order to develop an Advisory Team of 10 to 20 individuals. The Advisory Team shall include representatives of ECWRPC and WEDC and shall meet no less than four (4) times during the DISC initiative process. This team will oversee and guide the development of the information, as well as the deliverables of this project. The Consultant shall also prepare and submit written quarterly reports and periodically attend and report out to the ORDIDI Management Steering Committee which is

overseeing the entire DoD-OEA grant program. ECWRPC, WEDC and DoD-OEA staff shall review and approve the final Advisory Team composition prior to initiation of the project.

**b. Aggregation and qualification of existing supply chain:**

The Consultant shall detail their approach and methods of identifying and collecting information that will map the defense supply chain of the OC impact area / Northeast Wisconsin Region down to the Tier 2 suppliers. This response should include, at a minimum:

1. A listing of proposed NAICS codes and industry clusters/sub-clusters which will be reviewed as part of this effort and how they may relate to other components and activities of the overall ORDIDI program;
2. Methods by which the Consultant will engage the suppliers as active participants in the initiative, and how they will be committed to working with partner organizations to advance market diversification objectives;
3. A description of the format and contents of the database that will be generated and how proprietary private-sector information will be treated, if required.

Final deliverables for this task include detailed mapping and information for each identified Tier 1 and Tier 2 supplier.

**c. Organization, development and deployment of a web-based supplier directory:**

The Consultant shall describe its approach and abilities to develop a web-based supplier directory (portal) which will achieve the market diversification objectives. This response shall include, at a minimum:

1. Past experience and successes with similar projects;
2. A technical description of the web-based directory platform and requirements as well as its format, content, utilization, and maintenance. This response should discuss how the web-platform would be rolled out and ideal linkages to existing websites.
3. A description of how the web-based supplier directory will assist in communication objectives, including planned outreach/educational activities that will target existing defense industry suppliers from northeastern Wisconsin. This activity should lead to the development of pathways for suppliers to enhance market and production performance.
4. How new market opportunities will be premised on the cumulative production capacities of the entire supply chain and how participating suppliers will be presented to new markets as both a comprehensive supply chain offering, and as individual firms seeking to connect to potential new markets.
5. A description of how this work will advance an aviation/aerospace cluster and how it can also serve to qualify market diversification potential and related supply chain market access strategies based on existing production capacities.

Final deliverables for this task include a completed and useable web portal which includes, at a minimum, information for all identified Tier 1 and Tier 2 suppliers.

#### **IV. Submission Requirements**

The proposal should describe the consultant's approach to completing each of the tasks outlined in the Scope of Services above. The proposal should provide sufficient detail to enable the Consultant Selection Committee to thoroughly evaluate and compare it with other proposals. The proposal should closely follow the format of the Scope of Services. At a minimum, proposals should include the following:

**a. Approach:**

A description of the consultant's understanding and approach to the project based on the elements included in the Scope of Services, item III. Also include a description of the type and level of support the consultant will require/expect from the project sponsor—such as staff support, provision of meeting/studio space, materials, meals, etc.

**b. Timeline / Work Plan:**

Provide an overall project timeline that specifies milestones for all tasks and key sub-tasks. The project shall be undertaken between April, 2014 and June, 2015. The project timeline can be modified and upon mutual approval between the selected consultant and the contracting authority with approval from the Department of Defense-Office of Economic Adjustment.

**c. Staff Qualifications:**

Resume's or profiles illustrating expertise, roles and experience of key project personnel.

**d. Organization Capabilities / References:**

Examples of comparable projects completed in the past 3 to 5 years, with references for each, at least three in total.

**e. Budget:**

Estimated budget based on the scope of services sub-components and the proposed approach detailing the time and budget allotted by task.

All products developed will become property of ECWRPC.

#### **V. Desired and Value-added Capabilities and Solutions**

Proposers are encouraged to exceed mandatory requirements and should state any value-added solutions in your response. The following desired features will be scored based on their value to the ECWRPC and the project as a whole:

**a. Innovative Approaches/Ideas:**

Describe innovative approaches your firm would take in working on this project or additional items that would complement the approaches outlined.

**b. Cost-Sharing of Project:**

This project is derived from a Department of Defense, Office of Economic Adjustment grant which requires a local match of at least 10% in cash or in-kind contributions. Please consider and outline in your budget any time, expenses or materials which would be provided above and beyond the contracted amount (i.e. discounted).

**VI. Consultant Selection Procedure**

**a. Evaluation and Scoring of Proposals**

Accepted proposals will be reviewed by a review team made up of, but not limited to, ECWRPC staff, Wisconsin Economic Development Corporation (WEDC) staff, and representatives of regional and local economic development organizations and partners, herein after referred to as the Consultant Selection Committee.

The proposals will be scored using the following criteria and maximum point values:

Overall Approach / Product Requirements	15 pts.
Timeline/Work Plan	15 pts.
Staff Qualifications	15 pts.
Organization Capabilities/References	15 pts.
Budget	20 pts.
Value Added Capabilities & Solutions	20 pts.
<b>Total Points</b>	<b>100 pts.</b>

## b. Estimated Schedule of Events<sup>1</sup>

RFP Released:	February 17 <sup>th</sup> , 2014
Proposal Due Date:	March 17 <sup>th</sup> , 2014
Period for Evaluation & Selection:	March 18 <sup>th</sup> – March 24 <sup>th</sup> , 2014
Contract Negotiations:	March 25 <sup>th</sup> – 31 <sup>st</sup> , 2014
Approval of Contract by ECWRPC & DoD-OEA:	April 1 <sup>st</sup> , 2014

## VII. Submission of Proposals

### a. General Instructions

The evaluation and selection of a contractor will be based on the information submitted in the proposal plus references and any required interviews / presentations or demonstrations. Proposers should respond clearly and completely to all requirements. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a proposal. Elaborate proposals (e.g. expensive artwork), beyond that sufficient to present a complete and effective proposal, are not necessary or desired.

### b. Incurring Costs

ECWRPC is not liable for any costs incurred by parties replying to this RFP.

### c. Submission

Applicants must submit **seven (7) printed copies and a .pdf version** of all materials no later than **4:00 P.M., Monday, March 17<sup>th</sup>, 2014.** Proposals shall be addressed to:

Ms. Katherine Ahlquist, Economic Development Planner  
 Attn: SUPPLY CHAIN MAPPING RFP  
 East Central Wisconsin Regional Planning Commission  
 400 Ahnaip Street, Suite 100  
 Menasha, WI 54952  
 Email: [kahlquist@ecwrpc.org](mailto:kahlquist@ecwrpc.org)

The words **SUPPLY CHAIN MAPPING RFP** should be clearly written on the envelope and in the subject line of the e-mail.

<sup>1</sup> Schedule is preliminary and subject to change.

### **VIII. Acceptance of Proposal Content**

By submitting a proposal, the proposer agrees that all or portions of the proposals contents may become part of a contract, if accepted, and ECWRPC will reject any proposal submitted by a proposer who does not accept this condition.

### **IX. Contract Negotiations**

The ECWRPC and Consultant Selection Committee reserve the right to negotiate the award and conditions of the proposal prior to entering into a written agreement.

### **X. Contact Person**

Questions regarding this RFP should be directed to:

Ms. Katherine Ahlquist  
Economic Development Planner  
East Central Wisconsin Regional Planning Commission  
400 Ahnaip Street, Suite 100  
Menasha, WI 54952  
Phone: 920-751-4770  
Email: [kahlquist@ecwrpc.org](mailto:kahlquist@ecwrpc.org)

### **XI. Proprietary Information**

Any restrictions on the use of data in the proposal must be clearly stated. All proposals and products, unless otherwise noted, become property of ECWRPC. All submitted proposals and information included therein or attached thereto shall become public record upon opening of proposals.

### **XII. Nondiscrimination & Equal Opportunity**

As a recipient and sub recipient of state and federal funds, ECWRPC complies with State of Wisconsin and Federal Equal Opportunity Regulations (s. 16.765, Wis. Stats., s.51.01(5), Wis. Stats.; Section 109 of the Housing and Community Development Act of 1974). ECWRPC also complies with Title VI of the Civil Rights Act of 1964, and the Civil Rights Restoration Act of 1987 (P.L. 100.259). Any contract resulting from this RFP shall contain provisions referencing ECWRPC's and the contractor's compliance with these regulations. ECWRPC has also complied with Title 15: Commerce and Foreign Trade, Section 24.36(e) regarding affirmative steps to encourage small and minority firms, women's business enterprise and labor surplus area firms to respond to this RFP.

The Commission shall provide a copy of its Affirmative Action Plan to prospective proposers, if requested.

### **XIII. Applicability of Federal Regulations**

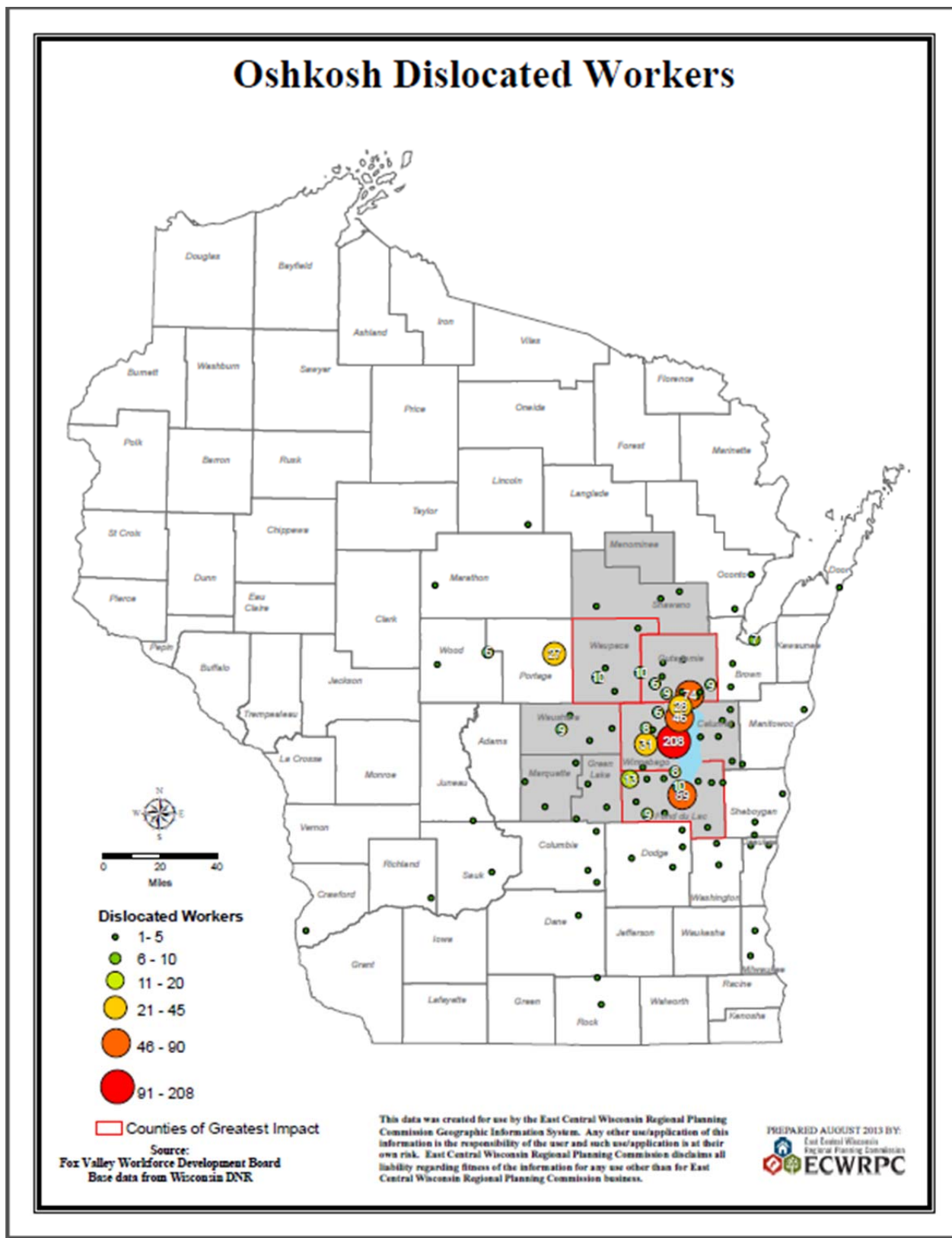
The selected contractor shall comply with all applicable terms and conditions of the ECWRPC and the Department of Defense grant. Such conditions shall be outlined in contract documents, which require approval by the Department of Defense prior to execution.

### **XIV. Insurance and Hold Harmless**

Per the ECWRPC's Competitive Bid Policy, the successful proposer, at the discretion of the ECWRPC Executive Director, may be required to provide insurance. If required, this would be made part of the contract. In addition, "hold harmless" provisions will be contained in the contract with the successful proposer.




## Appendix A: Map of East Central Wisconsin Regional Planning Commission Region and Dislocated Oshkosh Corporation Workers



## Appendix B: Oshkosh Region Defense Industry Diversification Initiative Fact Sheet

Economic Development Fact Sheet 2014-ED-1



**ECWRPC**  
East Central Wisconsin  
Regional Planning Commission

**PROJECT AREA**

- Winnebago Co.
- Outagamie Co.
- Calumet Co.
- Waupaca Co.
- Fond du Lac Co.

**PROJECT PARTNERS**

- East Central Wisconsin Regional Planning Commission
- City of Oshkosh
- UW-Oshkosh
- Winnebago County
- Outagamie County
- Chamco, Inc.
- New North, Inc.
- Wisconsin Manufacturing Extension Partnership
- Wisconsin Economic Development Corporation
- Wisconsin Department of Workforce Development
- Fox Valley Workforce Development Board
- Fox Valley Technical College
- Moraine Park Technical College
- Northeast Wisconsin Educational Resource Alliance
- Oshkosh Chamber of Commerce
- Fond du Lac County Economic Development Corporation
- Fox Cities Regional Partnership
- Waupaca County Economic Development Corporation


**FUNDING SUMMARY**

Dept. of Defense, Office of Economic Recovery = **\$837,315**

East Central Wis. RPC = **\$15,546**

Other Project Partners = **\$84,434**

# Oshkosh Region Defense Industry Diversification Initiative



### Background

In October, 2012, and again in April, 2013, Oshkosh Corporation (OC) publicly announced layoffs of more than 1,200 Defense Division employees in the Oshkosh-Neenah MSA. Through a mixture of natural attrition, early retirements and buy-outs, the final figure available detailing the number of OC employees laid off is estimated to be approximately 950.

This expected layoff represents a negative economic impact of over **\$91 million** in earnings and account for a loss of **1,437 total jobs** within the MSA<sup>1</sup>. The total number of manufacturing jobs lost from the regional employment base continues to be 1,200. This job loss represents over **1.25% of the total workforce**, and **3.93% of the manufacturing base** in the MSA<sup>2</sup>.


The Oshkosh Region Defense Industry Diversification Initiative was awarded to mobilize a regional response to impacts to the region's defense manufacturing base.

### Project Goals

The overall project goal is to assist in the growth and expansion of new industry clusters which are less reliant on federal defense contracts. In order to accomplish this, the project's activities support the following objectives:

1. Align current economic development plans and update them with diversification strategies
2. Promote the growth of new and existing businesses in targeted industries through workforce and supply chain initiatives
3. Map the regional defense industry supply chain and provide technical assistance to Oshkosh Corporation suppliers in order to re-engage them in other industry sectors
4. Identify emerging aerospace industry opportunities for the region and build upon advanced manufacturing assets


### Project Funding



The Department of Defense Office of Economic Adjustment (DOD-OEA) awarded an **\$837,315** Federal grant to the East Central Wisconsin Regional Planning Commission (ECWRPC). ECWRPC applied for this discretionary, non-competitive grant funding from the DOD-OEA.

The project includes a 10.7% local match from East Central Wisconsin regional partners.

### Project Timeline



A 16 Month Timeline (Jan '14—May '15) is in place to conduct this effort:

- Collaboration Charrette, 0-6 months;
- Partner Education & Training Seminar, 0-6 months;
- Aerospace Cluster Study, 0-6 months;
- Accelerator & Growth Management Academy, 0-6 months;
- Supply Chain Mapping, 0-16 months;
- Direct Supplier Assistance, 0-16 months

<sup>1</sup> Source: Economic Modeling Specialists, Inc., 2013.1 and ECWRPC, 2013.

<sup>2</sup> Source: The Bureau of Economic Advisors

OSHKOSH REGION DEFENSE INDUSTRY DIVERSIFICATION INITIATIVE

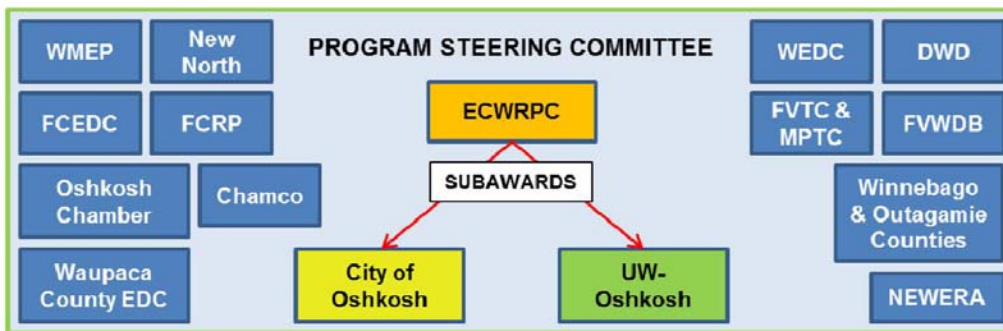
Project Leadership & Partners



This grant project was developed by ECWRPC in cooperation with numerous partners who are vested in the project outcomes and bring their expertise and resources to the table in order to improve the overall economic development 'ecosystem' within the greater Oshkosh Region. This project involves entities such as the Wisconsin Economic Development Corporation (WEDC), the City of Oshkosh, University of Wisconsin-Oshkosh and local technical colleges, Workforce Development Boards, County and regional Economic Development Corporations and Partnerships, the New North, Inc. and the Wisconsin Manufacturing Extension Partnership (WMEP).

About ECWRPC.....

East Central was established in 1972 and provides regional planning and technical assistance to seven member counties and their communities on multi-jurisdictional planning issues. In addition, the Commission also administers and coordinates several State and federally required planning programs related to transportation, sewer service, and economic development. One of nine RPCs within the State of Wisconsin, the East Central's governing body is comprised of 28 local government and citizen representatives that serve either a two or four year term, respectively.



Project Contacts

ECWRPC

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