



## **COMPETITIVE BID PROCESS**

*For Strategic Planning and Facilitation Contract Period:  
March through May 2026*

**Proposal due February 16, 2026**

## Section 1: Contacts and Important Dates

### Authorized Agency Contact

The authorized agency contact person for all matters concerning this competitive bid process is:

Michele Economou Ureste  
Executive Director  
Workforce Intelligence Network  
[michele.ureste@WINintelligence.org](mailto:michele.ureste@WINintelligence.org)

### Timetable

**A. Release Date: January 26, 2026**

- B. Question Period:** Questions must be submitted no later than **February 2, 2026**. Questions regarding this competitive bid process will be answered on a one-to-one basis. Interested parties should submit questions via e-mail to Michele Economou-Ureste at [michele.ureste@winintelligence.org](mailto:michele.ureste@winintelligence.org). Enter “Strategic Planning and Facilitation Question” in the subject line of the e-mail.

**C. Proposal Deadline for Submission:**

**Date: February 16, 2026**

**Time: Close of business (5:00 PM) Eastern Standard Time**

Delivery method: E-mail responses to [michele.ureste@winintelligence.org](mailto:michele.ureste@winintelligence.org) and [Alysha.albrecht@winintelligence.org](mailto:Alysha.albrecht@winintelligence.org). Please specify “Strategic Planning and Facilitation” in the subject line.

Quotes that are not received via e-mail by the due date and time will be considered late and may be excluded from the review process. WIN is not responsible for any technical issues that may occur.

**D. Selection Date: February 27, 2026**

Upon receipt of a competitive quote, WIN and project partners will select a vendor and set contract and payment terms.

## Section 2: Background and Overview of the Workforce Intelligence Network for Southeast Michigan (WIN)

WIN is a partnership of nine community colleges and seven Michigan Works! agencies in southeast Michigan. WIN’s mission is to cultivate a comprehensive and cohesive talent system to ensure employers find the workers they need for success.

The **WIN mission** is to cultivate a cohesive talent system by facilitating data-driven workforce solutions to ensure responsiveness to changing labor market demands. To accomplish this mission, WIN operates on the following three cohesive pillars:

- **Research.** WIN gathers, analyzes, and distributes real-time labor supply-and-demand intelligence on workforce needs and characteristics specific to the southeast Michigan region.
- **Engagement.** WIN convenes, facilitates, engages, and serves as a connection point for

business, industry, and other stakeholders regarding workforce development.

- **Solutions.** WIN develops education and training strategies for the delivery of regional workforce development programs through its partners.

WIN specializes in high-quality, advanced talent analysis and fostering collaboration among talent partners, including workforce development, community colleges, four-year postsecondary institutions, K-12 schools, economic development organizations, government, community-based organizations, and employers. WIN manages data-driven, employer-focused strategies in the areas of advanced manufacturing, information technology and cybersecurity, healthcare, transportation, distribution and logistics, retail, and defense, and has worked with hundreds of major employers and dozens of talent partners.

This year is the 15<sup>th</sup> anniversary of the Workforce Intelligence Network (WIN). The WIN Board of Directors conducted the first strategic planning session through a facilitated two-day retreat in 2018 and has been holding half-day WIN strategic planning sessions with board and staff on a bi-annual basis since that time. The selected consultant will facilitate a full-day strategic planning session with WIN board and staff on **April 24, 2026 from 9 a.m. – 4 p.m. in Southfield, Michigan.**

Any individual or organization with the experience and skills in facilitating and assisting with the development of strategic plans and partnerships is welcome to bid on this project. It is expected to be a limited, two-month, engagement.

### Section 3: Scope of Work and Deliverables

Please visit [www.WINintelligence.org](http://www.WINintelligence.org) to access information about WIN programs and initiatives. The selected bidder will be responsible for:

#### Phase 1: Project Initiation & Discovery (March 2026)

##### Scope

- Establish a detailed project plan, timeline, and communication cadence
- Review existing WIN materials (strategic plans, board materials, program summaries, performance data)
- Conduct limited stakeholder input activities (e.g., interviews or surveys with board members, staff, and select partners)

##### Deliverables

- Project workplan with milestones and responsibilities
- Stakeholder engagement plan (who, how, and when)
- Summary of key themes and strategic considerations emerging from discovery

#### Phase 2: Strategic Framework Development (March–April 2026)

##### Scope

- Design and facilitate strategic planning activities grounded in best practices for similarly sized nonprofit workforce organizations
- Facilitate structured analysis (e.g., SWOT or equivalent)
- Develop draft strategic priorities aligned to WIN’s mission, pillars, and regional role

### **Deliverables**

- Facilitation agenda and materials for the April 24, 2026 planning session
- Draft strategic framework including:
  - Strategic priorities (3–5 recommended)
  - High-level goals and outcomes for each priority
  - Key assumptions and risks

### **Phase 3: Board & Staff Strategic Planning Session (April 24, 2026)**

#### **Scope**

- Facilitate a full-day, in-person strategic planning retreat for WIN board and staff
- Guide discussion toward consensus on strategic direction and priorities
- Capture decisions, unresolved questions, and implementation considerations

#### **Deliverables**

- Professionally facilitated full-day planning session
- Post-session summary memo documenting outcomes, decisions, and next steps

### **Phase 4: Final Strategic Plan & Board Report (May 2026)**

#### **Scope**

- Refine strategic priorities based on board and staff input
- Translate priorities into a practical, actionable strategic plan
- Prepare materials suitable for board adoption and external communication

#### **Deliverables**

- Final written strategic plan (recommended 3-year horizon) including:
  - Vision and strategic context
  - Strategic priorities and goals
  - High-level implementation roadmap
  - Suggested metrics or indicators of success
- Final presentation and report to the WIN Board of Directors

## **Section 4: Proposal Format, Review Process, and Evaluation**

### **Proposal Format**

Proposals should be prepared as simple as possible and provide a concise description of the bidder’s

capabilities to produce aforementioned deliverables. The Bidder will provide the following required information to demonstrate that the bidder has the experience and knowledge needed to successfully complete the project. Please limit your total narrative response to 12 pages, including all required forms and examples. The required submittals are:

- A. **Cover Letter:** Provide a cover letter introducing your firm and proposal.
- B. **Strategic Planning and Facilitation Experience / Project Examples:** Provide an example of a successfully developed strategic plan. Preferred projects presented should demonstrate experience with the issues and programs of the following types of organizations: workforce development, economic development, human services, or similar organizations. Please include information for any work that you anticipate subcontracting, with a description of the person or organization to be subcontracted.
- C. Provide a **Reference** for the project, including name, title, and phone number.
- D. **Key Project Personnel / Project Organization:** The project consultant should have a minimum five years of experience in strategic planning and facilitation. Provide a detailed resume for the consultant and include years of experience, relevant experience, education, professional registrations and certifications.
- F. **Project Approach:** Present your understanding of the project and the scope of the services required. Break down the project into phases with a timeline and deliverables.
- G. **Fees:** Provide an estimated total fee to provide the scope of services. The work effort to complete this project is estimated to be 40-60 hours in total.

#### **Bid Review Process**

The application is a preliminary mechanism used to determine the suitability of a service provider for funding. The review process involves:

- A. **Preliminary Screening:** To be considered for funding you must complete the entire application. Based on your response, an evaluation team will determine application status.
- B. **Follow-up / Fact Finding Documentation:** Upon analysis of your completed application and budget, you may be asked by WIN to submit additional information or details to the evaluation team.
- C. **Evaluation Process:** Proposals will be scored using a pre-determined scoring matrix by a formal evaluation committee. Vendors with the top proposals may be asked to participate in an interview or asked to provide further information/clarification. The WIN evaluation committee will then select a vendor.

#### **Proposal Content and Evaluation**

Based on information submitted, your suitability to deliver service will be rated in the following manner:

- **Methodology: 40 points**  
Forty (40) points are awarded for the methodology used for pre-planning activities, strategic

planning, and SWOTT facilitation.

- **Past Performance: 20 points**

Please provide an overview of experience, including an example and reference of another work product.

- **Customer Service: 20 points maximum, four (4) pages maximum**

Please describe the customer service arrangement we can expect throughout the course of the contract, including what service is provided and how we can access this service.

- **Total Cost and Timing: 20 points**

The proposed contract period is March, 2026 through May, 2026. Availability during this timeframe, including attendance at the scheduled April 24, 2026 board meeting in Southfield, Michigan. Please present your cost for the contract period. Costs should be itemized and include implementation, facilitation, and travel as items within the total budget.

### Evaluation Scoring

Methodology	<b>40</b>
Past Performance	<b>20</b>
Customer Service	<b>20</b>
Total Cost and Timing	<b><u>20</u></b>
<b>Total Points</b>	<b>100</b>

### Section 5: Contract Terms and Conditions

When a vendor is selected, WIN and the vendor will create a contract governing services, payment, and other terms. The contract will note the following:

- The type of contract being awarded
- A W-9 being required for payment
- Payment terms will include 50% payment at the start of the contract period and 50% at the completion of all work and deliverables.
- WIN/SEMCA is tax-exempt and will supply such certificate upon request

### Section 6: Required Forms

The three following forms must be completed and submitted with proposals. These forms will not count towards the total page limit.

### Cover Page

(Vendor Logo) Vendor Name

*Response to competitive bid  
process*

*Strategic Planning and Facilitation Vendor Contract Period: March 2026 – May 2026*

## Identifying Information

- A. \_\_\_\_\_  
Name of Organization
- \_\_\_\_\_
- Street Address
- \_\_\_\_\_
- City State/Zip County
- B. \_\_\_\_\_
- Contact Representative and Title
- C. \_\_\_\_\_
- Phone Number
- D. Type of Organization: ☐ Public School ☐ Private Non-Profit
- ☐ Private for-Profit ☐ Community-Based Organization
- ☐ Community College ☐ Other (specify) \_\_\_\_\_

The Workforce Intelligence Network for Southeast Michigan is seeking the services of an organization that is qualified and experienced in providing a comprehensive package of services. For maximum flexibility, continuity and efficiency, the Workforce Intelligence Network will contract with one or more organizations to provide the deliverables as outlined in this Competitive Bid Process.

### Bidder's Signature Sheet

Please complete this form and return as part of the Competitive Bid Process.

Bidding under the name of: \_\_\_\_\_

Federal Employer Identification Number: \_\_\_\_\_

which is (check one of the following):

- ☐ Corporation, incorporated under the laws of the State of \_\_\_\_\_  
List all officers and stockholders:

\_\_\_\_\_  
\_\_\_\_\_

- ☐ Assumed Name (Register No. ) \_\_\_\_\_
- ☐ Individual
- ☐ Partnership

Is any owner, partner, stockholder or employee of the company or institution completing this Competitive Bid Process associated with or have a family member serving on the Workforce

Intelligence Network, or Workforce Intelligence Network Board, or an administrative employee of the Workforce Intelligence Network, or Workforce Intelligence Network?

☐ Yes

☐ No

If yes, name of company member: \_\_\_\_\_

I certify that this proposal is a firm offer to begin March 2, 2026, and that complete and accurate records justifying all expenditures, leaving a clear audit trail to point of origin will be maintained, subject to periodic audit by the Workforce Intelligence Network for Southeast Michigan, Southeast Michigan Community Alliance, and/or State of Michigan. I further certify that I have read and understand the specifications preceding this application.

**NOTE:** This document must be signed by the individual who has signatory authority for the organization under whose sponsorship this proposal has been submitted.

Authorized Signature: \_\_\_\_\_

Printed or Typed: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Date: \_\_\_\_\_

If another individual is authorized to sign contracts as a result of this proposal, indicate:

Name of Authorized Individual (type): \_\_\_\_\_

Signature of Authorized Individual: \_\_\_\_\_

When payment on such contract is to be directed to the same company at an address different from above, fill in that address:

## **Section 7: General Terms and Conditions**

### **Grievance Policy**

The Workforce Intelligence Network subscribes to the policy of equal opportunity and as such, maintains a formal grievance procedure to handle complaints of customers and service deliverers. Adherence to same is acknowledged by acceptance of a contract from the Workforce Intelligence Network.

### **Right to Refusal and Proposal Preparation Costs**

This preliminary application does not commit WIN to award a contract, or to pay any costs incurred in the preparation of a proposal submitted in response to this request or to procure or contract services or supplies. This includes any demonstration and/or interviews that are part of the proposal process. The Workforce Intelligence Network reserves the right to accept or reject any or all proposals in part or in their entirety if it is in the best interest of the Workforce Intelligence Network



to do so.

**Right to Negotiate**

The Workforce Intelligence Network contracting officer will require the proposer selected to participate in negotiations and to submit any price, technical, or other revisions of their proposals as may result from negotiation.

**Right to Request Additional Information**

WIN reserves the right to request any additional information that might be deemed necessary after the completion of this document.

**System Design Costs**

The successful Vendor shall be responsible for all design, information gathering, and required programming to achieve a successful implementation. This cost must be included in the base bid.

**Pricing Eligibility Period**

All vendor proposal bids are required to be offered for a term not less than **120** calendar days in duration.

**Additional Charges**

No additional charges, other than those listed in the proposed cost breakdown, shall be made. Prices quoted will include verification/coordination of order, all costs for shipping, delivery to all sites, unpacking, setup, installation, operation, testing, travel, cleanup, and training.

**Federal or State Sales, Excise, or Use Taxes**

Owner does not pay sales use tax. All other taxes, fees, permits and shipping costs, etc. shall be included.

**Contract Requirements**

WIN considers this bid process legally binding and will require that this Competitive Bid Process and the resulting awarded vendor Proposal and any amendments be included as addenda to any subsequent contracts between the Vendor(s) and Workforce Intelligence Network. It should be understood by the Vendor(s) that this means that the Owner expects the Vendor(s) to satisfy substantially all requirements and reports listed herein. Exceptions should be explicitly noted in the Vendor Proposals. Lack of exceptions will be considered acceptance of all specifications as presented in this bid process.