

Environmental Council of the States Request for Proposals: 01-AGILE-2018

Agile Project Management Training

**Released: July 13, 2018
Responses due: July 20, 2018**

The Environmental Council of the States (ECOS) is requesting proposals from qualified vendors to develop and deliver an in-person training session on Agile Project Management at a meeting in October 2018.

1. Background and Purpose

ECOS is the national nonprofit, nonpartisan association of state and territorial environmental agency leaders. The mission of ECOS is to improve the capability of state environmental agencies and their leaders to protect and improve human health and the environment of the United States of America.

ECOS and its member agencies are partners with U.S. EPA and tribal environmental agencies in an initiative called [E-Enterprise for the Environment](#). E-Enterprise partners use a shared governance model to streamline business processes and leverage technology that enables the nation's environmental protection enterprise to be more informed, timely, and productive.

In October 2018, E-Enterprise will be convening [EE2018—the E-Enterprise National Meeting](#) in Addison, TX. EE2018 is a meeting that attracts approximately 300 professionals from environmental agencies at all levels of government—federal, state, tribal, territorial, and local. It will feature opportunities for attendees to connect, collaborate, and learn more about the innovative work happening across the environmental protection enterprise. Attendees include executives, managers, and staff who are responsible for programs which rely significantly on technology solutions. Many of the participants work in information technology offices in their organizations.

Part of the meeting program will include training opportunities. Agile Project Management is a topic that interests many of our attendees. Many environmental agencies have begun or are considering implementing Scrum or other Agile-like software development methods in lieu of a waterfall approach to project management. Agencies have reported a wide range of experiences in attempting to implement Agile in their organizations and have openly shared their stories at previous meetings. ECOS is interested in helping agencies be successful in implementing effective and productive software development cultures.

2. Request for Services

ECOS is seeking proposals from qualified vendors to develop and conduct a half-day (4-hour) training session on Agile Project Management. The training should include foundational principles, best practices, and how to get started and succeed in developing an Agile software development culture.

The purpose of this training is to provide attendees with a solid understanding of the following elements:

- Introduction of conceptual elements and origins of Agile
- Agile framework and terminology
- Typical Agile roles, such as Scrum Master and Product owner
- Benefits and comparison of Agile methodology to waterfall
- Description of Agile Sprint Cycles, including specific roles and patterns
- Discussion and practical advice about successfully transitioning to an Agile culture

In the response, bidders should describe the proposed training session and content. Please include information on any materials that will be shared with or distributed to the trainees (slides, literature, or other materials). Bidders must also indicate whether copies of the materials can be made available to ECOS for broader distribution to our partners not present for the training.

Bidders are free to highlight a particular practice of Agile, such as Scrum or Kanban. Bidders are also free to be creative in how to structure the sessions to provide the most benefit to the participants. ECOS also encourages the use of light interactive workshops, to the extent feasible, to directly engage participants and demonstrate Agile concepts.

The successful bidder will deliver the training at the location below on Tuesday, October 23, 2018 from 8:00AM – 12:00PM CDT. ECOS may also request delivery of a second identical training session on Monday, October 22, 2018 from 1:00PM – 5:00PM CDT. Attendee demand and training costs will drive ECOS' decision to hold the second training session. Bidders should include pricing for delivery of one or two training sessions.

Meeting attendees will have the option to choose to participate in this training or other workshops/sessions that will be held concurrently. ECOS will require attendees for this training to pre-register in advance of the meeting. ECOS would like to offer this training to 40-50 attendees per session but would appreciate thoughts from bidders about ideal numbers given the proposed format and material. Training attendance can be capped if mutually agreed to.

Dates and Times

Required Training Session – Tuesday, October 23, 2018 from 8:00AM – 12:00PM CDT
Potential 2nd Training Session - Monday, October 22, 2018 from 1:00PM – 5:00PM CDT

Location and logistics

The meeting will be located at:

[Renaissance Dallas Addison Hotel](#)
15201 Dallas Parkway
Addison, TX 75001

ECOS can equip the meeting space with presentation capabilities (screen, projector, laptop), microphones, and internet connectivity. ECOS anticipates using a room that will be approximately 1200 square feet (41' x 29'). Bidders should include in their response any specifications around room set-up, technology needs, or other facility requirements.

ECOS can have, at the vendor's discretion, 1-2 partner staff members available to assist with the training. These staff will have been previously trained as a scrum master and/or product owner, or have significant experience implementing agile.

3. Required Proposal Content

The proposal should be streamlined and concise. Complete responses will include the following information:

- A. Detailed description of your approach to developing and delivering the training workshop.
 - Please include any proposed assumptions, constraints or facility related requirements.
 - Please include information on any materials that will be shared with or distributed to the trainees (slides, literature, or other materials). Bidders must also indicate whether copies of the materials can be made available to ECOS for broader distribution to our partners not present for the training.
 - Also include a statement indicating whether the bidder expects to use the 1-2 ECOS partner staff to assist with the training and how you propose to deploy them.
- B. Background on your Agile training practice and corporate and staff qualifications. Please include resumes of proposed Facilitator(s)/Trainer(s).
- C. Three relevant client references (name, phone number, email address) for whom similar work was performed.
- D. Fixed Price cost for the work. Please include all costs, including travel to and from the meeting. Also include up to two planning calls with ECOS and other meeting planners to finalize the details prior to the meeting. Costs should include prices for: (1) the single training session on Tuesday, October 23rd and (2) the cost for delivering an identical training session on Monday, October 22nd.
- E. Payment schedule: ECOS expects to receive a single invoice for the cost of the training(s) at the conclusion of the event.

4. Submittal Instructions

Responses to this Request for Proposals are **due to ECOS by 5:00 PM ET on July 20, 2018**. Responses must be e-mailed as one (1) PDF file to:

Kurt Rakouskas
Environmental Council of the States
krakouskas@ecos.org

In the Subject Line of the e-mail, enter "RFP 01-AGILE-2018." Do not include any additional information in the Subject Line.

Receipt of Proposals will be acknowledged by return e-mail from Kurt Rakouskas within three business days.

Hard copy submittals will not be accepted or acknowledged.

5. Evaluation Process

ECOS plans to use the following process in evaluating proposals:

- Initial screening
 - Verify that the Proposal is received before the deadline published in the RFP.
 - Confirm that the Proposal is complete and includes the items requested in section 3 of this RFP.
- Evaluation of the Proposals. ECOS will evaluate proposals based on the following criteria:
 - Overall understanding of the project
 - Quality of the training approach
 - Corporate and staff qualifications
 - Cost
- Check References
- Final contract negotiation with successful bidder

6. Questions and Answers

All questions regarding this Request for Proposals must be submitted by e-mail to Kurt Rakouskas at krakouskas@ecos.org by 5:00 PM EDT on July 18, 2018.

Hard copy questions and phone inquiries will not be accepted or acknowledged.

7. Waiver and Acknowledgments

By submitting a response to this Request for Proposals, "Responder" expressly waives any and all claims against ECOS, its officers, directors, employees, subcontractors, and agents, and assumes full responsibility for any and all damages, claims, losses, costs, and expenses that the Responder may incur arising from or relating to this Request for Proposals or its response to this Request for Proposals. This waiver does not apply to damage or loss resulting from the sole negligence, gross negligence, or willful misconduct of ECOS, its directors, officers, employees, or agents.

Responder expressly acknowledges that its response to this Request for Proposals does not create a contract between Responder and ECOS.

Responder expressly acknowledges that ECOS is under no obligation to provide one-on-one feedback to any Responder concerning its response, ECOS' methodology and deliberations for evaluating responses, or ECOS' selection of a Contractor.

ECOS reserves the right to contact individual Responders for any reason and at any point in its decision-making process. ECOS is under no obligation to disclose any contact with any Responder(s).

Responder expressly acknowledges that the decision to select or not select a Contractor in response to this Request for Proposals is:

1. made at ECOS' sole discretion,
2. may be based on any factors ECOS chooses to consider, and
3. may or may not be based solely on cost considerations.

8. Confidentiality and Disclosure

By submitting a response to this Request for Proposals, Responder agrees to keep confidential and not use or disclose any information acquired during the review process concerning ECOS, its business, finances, or operations. The provisions of this Section shall not prevent the Responder from disclosing information to the extent required by a judicial order or other legal obligation, provided that, in such event, the Responder shall promptly notify ECOS in writing, and shall cooperate with ECOS to contest or minimize the scope of the disclosure (including application for a protective order).

Responder expressly acknowledges that ECOS may be required to disclose the contents of any response received. Further, Responder expressly acknowledges that ECOS may distribute some or all responses, via e-mail, to members of the project team, who may be bound by Federal or State requirements to disclose information sent to their organization's e-mail system. Consequently, neither ECOS nor members of the project team are under any obligation to keep any response confidential.