**REQUEST FOR PROPOSAL**

**CONTENT DEVELOPMENT PARTNER**

**CatCo**

**Proposals Due By: 05/05/24**

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# **INTRODUCTION**

## **CatCo BACKGROUND**

The CatCo makes up the largest railcar repair network in North America. For over 3 years, we have repaired the tank and freight railcars responsible for transporting tons of goods each day, serving every major sector of the economy. We are the leading providers of comprehensive repair and maintenance solutions for railroad tank and freight cars.

Our repair shops across North America are strategically located to help customers minimize downtime and offer a full range of tank and freight car repair services including:

* Mechanical Repairs
* Valves and fittings service
* Compliance testing
* Coatings and linings
* Cleaning
* Tank car modification

With over one hundred years of experience, we are proud to be a trusted name synonymous with quality and reliability in rail equipment maintenance and repair.

## **PURPOSE AND GOALS**

CatCo is seeking to supplement the capacity and expertise of our internal Learning and Development Team by working with an external content development partner to create an initial volume of learning content, support surge capacity, and partner on ongoing content improvement and sustainability. By partnering with a skilled and experienced content development vendor, we hope to leverage internal expertise in conjunction with external support to create high-quality, engaging, digestible, and actionable learning content that aligns with our business needs.

Goals of a content development partnership include:

1. Increased Capacity and Scalability

* Expand the capacity of the internal Learning and Development Team to develop and deliver a higher volume of content that incorporates multiple modalities and media and can scale with the needs of the business.

1. Expedite Content Development Timelines

* Reduce the time to launch for learning content and programs.

1. Enhanced Learning Effectiveness

* Align adult learning principles and best practices with the specific needs of our industry and company to create effective learning programs.

1. Technology Integration and Innovative Solutions

* Incorporate multimedia assets and innovative approaches into the training curriculum.

# **SERVICE DETAIL**

## **TRAINING CONTEXT AND TARGET AUDIENCE**

### TRAINING CONTEXT

The training to be developed in conjunction with the selected content development partner is largely technical in nature and generally falls into three categories:

1. Operations

This training is focused on the specific skills and knowledge an employee must have to perform their job effectively and safely. Topics could include familiarity with and use of specific tools, task-related processes, documentation-related processes, and cleaning processes.

Topics are largely geared towards new employees to build proficiency in their role. Currently these training topics are delivered as On-the-Job Training without the support of formal content.

1. Quality

This training is focused on specific quality assurance procedures and regulations that must be adhered to when performing and / or overseeing the work. Topics could include specific procedures such as inspection or specifications to be adhered to such as paint quality.

Currently these training topics are delivered through the review of the procedure or specification document.

1. Safety, Health, and Environment (SHE)

This training is focused on knowledge and skills necessary to ensure regulatory compliance and life safety on the job in the context of a railroad car repair shop. Topics could include specific Personal Protective Equipment specifications such as Clear Face Shield, Hazardous Chemical Awareness such as Nitrogen Awareness, Job Related Safety such as Welding, among others.

Currently these training topics are delivered through a combination of eLearning, Classroom Training, and On-the-Job Training.

### TARGET AUDIENCE

The primary target audience for all three categories of training are the roughly 33 employees who perform repair and maintenance work on railroad cars in our network of Repair Shops across the United States and Mexico.

Much of the training is focused on building new hire proficiency in job-related and safety practices and many new hires have not had the experience of working in a railroad car repair shop previously.

The target audience is largely made up of highly kinesthetic learners that respond well to content that is easily digestible and readily actionable.

## 

## **SCOPE OF SERVICES**

CatCo is seeking a content development partner to provide end-to-end content development services to include:

1. Oversight of the full, end-to-end instructional design process and instructional designers.
2. Project Management for assigned instructional design projects.
3. Design and development of content across modalities to include creation of multimedia assets.
4. Quality assurance and content review.
5. Partnership with subject matter experts to distill critical information.
6. Software, licensing, and certifications necessary for development of digestible, actionable, and engaging learning content across modalities.

We are seeking to partner with a vendor that can provide a reliable fee structure with financial flexibility to provide a base set of resources to account for multiple learning solutions and the opportunity to flex-up when needed.

Service Responsibility Matrix:

| **PROCESS** | **PROCESS OWNER** | **TIMING/FREQUENCY** | **QUALITY OF SERVICE** |
| --- | --- | --- | --- |
| **Course Requirements** | Client SME / Content Development Partner | On-demand | Partnership between vendor and client SME to distill course learner requirements and document critical information. |
| **Design** | Content Development Partner | On-demand | Outline course design and scope deliverables using client Charter document. |
| **Course Design Proposal** | Content Development Partner | Defined on course-by-course basis | Design Document to include modality, content elements, and format for course development; assume pricing based on approved pricing framework. |
| **Course Development** | Content Development Partner | Following approval of client to begin development. | Course development will follow course design document. |
| **Media Design and Development** | Content Development Partner | As needed | Design and development of media needed for final course product; vendor may use sub-contractors for media development on as-needed basis. |

## **ADDITIONAL REQUIREMENTS**

In addition to the scope of services described above, we are seeking content partners that meet the following requirements in their experience and service delivery model:

* Experience partnering with, and adapting content culturally for, international companies, specifically companies operating across the United States and Mexico.
* Ability to develop content in both English and Spanish.
* Flexibility to partner with subject matter experts and engage in on-site activities during non-traditional schedules (e.g. 3rd shift).
* Development of SCORM compliant content that can be tracked through the LMS REDACTED.
* A clearly defined and streamlined methodology for subject matter expert partnership that is:
  + Efficient and effective.
  + Sensitive to subject matter expert work schedules and time constraints.
* Methodology for rapidly capturing content owner and subject matter expert knowledge when needed (e.g. role transition).
* Clearly defined and documented instructional design and rapid development processes.
* Intuitive processes and tools that provide ease of use.
* Experience transforming technical content and on-the-job training into digestible, actionable, and engaging learning experiences.

# **REQUEST FOR PROPOSAL DETAIL**

## **EVALUATION CRITERIA AND BASIS OF AWARD**

All proposals will be rated on the criteria outlined below by a panel of evaluators. The CatCo reserves the right to select a content development partner directly after review of all proposals or to enter into competitive negotiation with two (2) or more qualified respondents whose proposals are in the competitive range based on the evaluation results.

### CRITERIA

1. Instructional Design Expertise and Process

* Understanding of adult learning principles.
* Use of best practice instructional design models and processes.
* Use of measurable learning objectives.
* Demonstrated effectiveness of learning solutions.
* Intuitive instructional design processes and tools.

1. Interactive Content and User-Centered Design

* Easily digestible and readily actionable content.
* Incorporation of multimedia leveraging microlearning principles in approach.
* Incorporation of trackable knowledge checks and assessments.
* User friendly and accessible to the target audience.
* Incorporation of learner feedback into the final product.

1. Technology and Media Integration
   * SCORM compliant content that can be delivered and tracked through the Rockstar Learning Management System.
   * Content compatibility across multiple common browsers (Chrome, Edge, Firefox, etc.).
2. Project Management and Communication

* Dedicated Project Manager and project management methodology.
* Clear plan for communication cadence including regular project updates and escalation pathways.
* Demonstrated ability to manage timelines for on-time delivery.

1. Subject Matter Expert Engagement and Review Processes

* Clearly defined and streamlined methodology for partnering with subject matter experts that makes effective and efficient use of their time.
* Clearly defined methodology for capturing subject matter expert knowledge rapidly then needed to support knowledge management.
* Ability to partner with subject matter experts and engage in on-site activities (gathering footage, etc.) during non-traditional schedules (e.g. 3rd shift).

1. Cultural Competence and International Experience

* Experience partnering with global companies to create content internationally (minimally across the United States and Mexico).
* Ability to adapt content culturally through use of language, scenarios, examples, etc.
* Development of content in both English and Spanish.
* Adapting core content to meet requirements across countries.

1. Price Proposal and Fee Structure

* Reliable fee structure with financial flexibility to provide a base set of resources to account for multiple learning solutions and the opportunity to flex-up when needed.

## **VENDOR SUBMISSION GUIDELINES**

This section contains instructions for providing information required to evaluate the proposal. Each required item is listed separately below with a description. Provide separate responses to each item in the order in which they are presented, numbering each response correspondingly.

Submissions should be compiled as an organized proposal aligned to the specifications detailed in this RFP and highlighting relevant experience and industry partnerships.

Submissions are required to include the following:

1. A cover letter highlighting relevant company experience and successes.
2. Company Overview to include:
   * Overview of services provided by the company, including the number of years these services have been provided, the number of clients that they have been provided for, and breakdown of client industries.
   * Emphasis on any customers similar in nature to CatCo with similar training needs.
3. Instructional Design and Subject Matter Expert engagement models and processes to include:
   * A documented, clearly defined, and streamlined instructional design process.
   * A documented rapid development process to leverage as needed.
   * A documented, clearly defined, and streamlined methodology for SME partnership that demonstrates efficiency and effectiveness.
4. Team structure and communication pathways to include:

* A Project Manager / single point of contact for the vendor team.
* Information on the employees that will be dedicated to the CatCo account as well as any other support structures in place.
* Communication and escalation cadence and pathways.

1. References to include:
   * A list of three clients for whom similar services have been provided:
     + Client Name
     + Client Address
     + Contact Person
     + Contact Person’s Title
     + Telephone Number
     + Email
     + Dates of service delivery and brief description of services delivered
2. Content Samples as separate files to include:
   * Examples of multimedia micro-learning
3. Pricing and Rate structure to include:

* Reliable fee structure with financial flexibility to provide a base set of resources to account for multiple learning solutions and the opportunity to flex-up when needed.

## **CONTACT INFORMATION**

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## **CONFIDENTIALITY STATEMENT**

CatCo is committed to maintaining the confidentiality of all information disclosed by respondents during the RFP process.

As a part of the submission, the respondent agrees to enter into a Non-Disclosure Agreement (NDA) with CatCo. The purpose of the NDA is to protect the confidentiality and proprietary nature of the information shared during the RFP process. This includes, but is not limited to, the content of the RFP document, discussions, presentations, and any other information related to CatCo and the respondent.

Respondents are hereby notified that all intellectual property rights, including but not limited to copyrights, patents, trademarks, trade secrets, and any other proprietary rights related to the training content developed as a result of this RFP, shall be owned exclusively by CatCo. The respondent agrees not to claim any ownership or seek any rights to the intellectual property developed during this project.

All information provided by respondents in response to this RFP is intended solely for the purpose of evaluating and selecting a qualified vendor for the development of training content. Any use of this information for purposes other than the RFP evaluation process is strictly prohibited.

Any breach of confidentiality, including unauthorized disclosure or use of confidential information, may result in legal action and other remedies available to CatCo.

By responding to this RFP, the respondent acknowledges and agrees to abide by the terms of this confidentiality statement and the attached NDA.

## **SUBMISSION INSTRUCTIONS**

Please send requested information via email to Joe Manderson to jamderson@catco.com by the submission date on the cover page of this document.

## **NOTIFICATION**

The following process will be followed to ensure transparency and clear communication throughout the RFP evaluation and selection process.

1. Receipt of Proposal

Upon the submission deadline, all received proposals will be acknowledged through an acknowledgment email confirming the successful receipt of their proposal.

2. Proposal Evaluation:

The evaluation team, comprising representatives from CatCo, will thoroughly review and assess each proposal based on the predetermined criteria outlined in the RFP document.

3. Shortlisting:

Shortlisted candidates will be identified based on the evaluation results. Shortlisted respondents will be notified via email and may be invited to share additional information, engage in additional discussions or share presentations.

4. Unsuccessful Candidates:

Respondents who are not shortlisted will be notified of their status via email.

5. Negotiation Phase:

For shortlisted respondents, negotiations may be initiated.

6. Award Notification:

The successful respondent will be formally notified of the award decision. This notification will include details on the next steps, contractual agreements, and any other information needed to proceed.

7. Contract Finalization:

Following the award notification, the necessary contract documents will be drafted and finalized, and the engagement will begin.

8. Confidentiality:

Throughout the entire notification process, confidentiality, as outlined in the Non-Disclosure Agreement (NDA), will be maintained.

This notification process is designed to ensure a fair, transparent, and efficient RFP process for all parties involved.