

REQUEST FOR PROPOSALS
FOR
EV/Electrification Supply Chain
in Wisconsin

ISSUED BY:

WISCONSIN ECONOMIC DEVELOPMENT CORPORATION

ON: JANUARY 19, 2022

All questions regarding this RFP must be submitted in writing to Jela Trask, at jela.trask@wedc.org by February 1, 2022, at 5:00 p.m. CST.

PROPOSALS MUST BE SUBMITTED BY:
FEBRUARY 18, 5:00 PM CST

To:
Jela Trask
jela.trask@wedc.org
Wisconsin Economic Development Corporation
201 West Washington Avenue, 6th Floor
Madison, WI 53703

I. Scope

The purpose of this Request for Proposals (RFP) is to provide interested proposers with the information needed to prepare and submit a Proposal for the following:

As part of the U.S. Department of Commerce, Economic Development Administration's (EDA) American Recovery Plan Act State Planning Grant Program, an award to Wisconsin will support economic development plans that identify new or existing industry clusters and the development of plans to support assessments of statewide supply chains. These plans aim to increase efficiencies or identify state assets and economic resources to help develop action plans for those industry clusters that will benefit the state's economy in a regional and global marketplace.

For Wisconsin, the focus of the grant is electrification/electric vehicle (EV) and is two-fold, focusing on both the supply chain for EV and EV charging station manufacturing capabilities and the infrastructure necessary to support the adoption of electrification. The Wisconsin Department of Transportation is developing a plan for electrification infrastructure needs while the Wisconsin Economic Development Corporation (WEDC) will focus on supply chain. The focus on electrification will go beyond "vehicles" and include other electrification sectors that are currently active in Wisconsin, including but not limited to recreation and small motor equipment/products, such as hand tools, generators, and lawn mowers. The analysis that WEDC seeks through this RFP will identify shared and unique inputs across the electrification sectors, including in areas of infrastructure, supply chain, workforce, and research and development. See Definition of electrification below.

Definition:

For the purposes of this research, electrification includes analysis of organizations (private and public) involved in the manufacturing; research and development; and maintenance of electrically powered vehicles and equipment including automobiles, light-, medium- and heavy-duty trucks, buses, industrial equipment, agricultural equipment, rail, recreational vehicles (such as marine motors, motorcycles, bicycles, etc.), and other sectors that currently rely on internal combustion engine (ICE) technology such as lawn and garden equipment. The research scope should include component parts (including battery cell, battery pack, motor controller, electric motor, regenerative braking, drive system components, and charging units) as well as secondary and tertiary (adjacent) industries and research that are or will be impacted by electrification. In addition, the research scope should include assessing the manufacturing capabilities related to charging stations. Electrification, as defined by the Energy Information Administration, is: the recognized process and related requirements to replace technologies that use fossil fuels (coal, oil, and natural gas) with those that use renewably produced electricity as a source of energy.

WEDC is looking for a company that is able to effectively provide the following services:

1. Conduct an economic analysis of current state of the Wisconsin manufacturing supply chain involved in traditional internal combustion engines (ICE), and other types of materials (inputs/outputs) related to products that rely on ICE, that will be disrupted with the transition to products that are/will be electrically powered. The analysis is focused on the manufacturing supply chain and the shift/impact on the supply chain from products running on ICE to products reliant on electrification. More specifically, in addition to supply chain, the analysis needs to include impact on workforce and the innovation pipeline to assess current state and future state of the transition from ICE to electrification. The economic analysis will need to include adjacent and tertiary industry impact of the transition to assess disruption, displacement and opportunity of this technological conversion.

Scope of the analysis needs to cover:

- a) Tier 1 manufacturers across key segments that are currently moving into electrically powered conversion or have plans to do so.
- b) The supply chain (primary, secondary and tertiary) that is impacted due to this transition with an assessment of the ease/difficulty and potential for pivot to electrification. Qualify and quantify the transitions along three distinct categories:
 - What inputs/suppliers will not be disrupted,
 - What inputs/suppliers will be minimally disrupted and are in segments that can easily pivot, and
 - What inputs/suppliers will be significantly disrupted and will be displaced with electrification
- c) For this supply chain that is currently participating in electrically powered input/outputs, include companies developing enabling technology that will advance the transition to electrification. This analysis needs to include the economic impact in terms of Wisconsin jobs, number of Wisconsin business locations, and annual revenue of the identified companies in the supply chain, or other factors that demonstrate economic impact that would be recommended by the proposer. In addition, for each business location, the following attributes need to be included:
 - Company Name
 - Address, including county
 - Products and services offered that relate to EVs and electrification
 - Six-digit NAICs related to EVs and electrification
 - Number of employees at the site

2. Conduct Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis of Wisconsin's position to capitalize on the opportunity of electrification across each sector. This would include identifying key areas where Wisconsin is currently leading (or falling behind) in current technology manufacturing capabilities and capacity, as well as future technology research, commercialization, and manufacturing of electrification. Recognizing that EV and the broader electrification market as defined above is rapidly evolving, it will be important for the proposer to provide a recommendation of a phased approach in answering the fundamental questions:
 - How can Wisconsin create short-term wins (hybrid potentially) while the full network is being developed and technology advancements are created?
 - How is Wisconsin best positioned to "leapfrog" to future state vs. competing in technology areas that are too far along for Wisconsin to make any meaningful competitive impact?

The SWOT analysis expects there will be a competitive assessment relative to other states, including those surrounding Wisconsin as well as other key states that are leading with electrification activity by way of state government, university, or private policies, programs, and other initiatives.

3. Provide recommendation, based on competitive analysis, to inform Wisconsin's policies and strategic investment required to support the growth of this industry cluster. The recommendation should identify priorities in resources, processes, and legislative policies, including but not limited to incentives, regulation and other key levers available to advance successful cluster development.
 - a) Policies and investment, including program (incentives, grants, etc.) guidelines that support existing business and community development as well as higher education research and workforce development
 - b) Policies and investment, including program (incentives, grants, etc.) guidelines that nurture entrepreneurship/ innovation to support existing strength and/or build capabilities

- c) Policies and investment, including program (incentives, grants, etc.) guidelines to attract targeted national and foreign direct investment activity. Recommendation should shape strategy that informs a targeted approach to national and foreign direct investment that addresses Wisconsin’s gaps and/or complements existing strengths.
- d) Deliver sample program guidelines critical to cluster development, including policies and program frameworks to help Wisconsin accelerate action plan and time to market.

Assumptions:

- WEDC economic development, academic, industry and state agency partners will be involved in both providing input in the analysis as well as receiving access to the report/analysis. The selected proposer will be responsible for facilitating the gathering of this input.
- The report and data analysis will need to be delivered in both summary as well as presentation format. In addition, WEDC will expect to have access to the raw data (supplier directory of businesses, etc.) in Microsoft Excel spreadsheet (.xlsx) format.
- Proposer will be expected to engage with WEDC’s state agency partners, to ensure the respective analysis performed by WEDC and the Wisconsin Department of Transportation address the full scope of the EV planning project.

Optional Additional Services:

In addition, if you are interested in providing, and able to provide, services on the following topics, please provide your experience with, and quotes for, such services in your proposal.

- How will electrification impact lower socio-economic sectors of our society?
- How can Wisconsin manage the impact while providing benefits of electrification to all citizens?
- Recommend policies and investment, including program (incentives, grants, etc.) guidelines to promote electrification in lower socio-economic sectors of our society.

Please note that your ability or inability to provide the above-referenced additional services will not impact WEDC’s consideration of your proposal.

II. Project Timeline

The work needed to be completed under this RFP is subject to tight timing constraints. Proposers responding to this RFP must be prepared to complete the project by June 30, 2022. That timeline is based on the following procurement process timeline. If this timeline is prohibitively restrictive, please indicate such and propose an alternate timeline.

Date	Event
January 19, 2022	RFP Issued
February 1, 2022	Deadline to Submit Questions by 5:00 p.m. CST
February 18, 2022	Proposals Due by 5:00 p.m. CST
March 1, 2022	Committee completes review of Proposals
March 4, 2022	Possible Interviews with Proposers
March 9, 2022	Approval of Award

III. Wisconsin Economic Development Corporation

The Wisconsin Economic Development Corporation (WEDC) is a public body corporate and politic governed by Chapter 238 of the Wisconsin Statutes. WEDC was created under 2011 Wisconsin Act 7 and 2011 Wisconsin Act 32 to replace the economic and community development operations of the former Wisconsin Department of Commerce and to serve as the State of Wisconsin's lead economic development organization. WEDC is governed by a seventeen-member Board of Directors and WEDC's Chief Executive Officer is appointed by the Governor.

WEDC provides financial and technical assistance and services to businesses and organizations in Wisconsin for the purpose of strengthening economic development and creating and retaining jobs. As of June 30, 2021, WEDC had approximately 116 employees and operating expenditures for FY21 totaled approximately \$116 million, including \$68 million of Federal funds as part of Coronavirus Aid, Relief, and Economic Security (CARES) Act. Revenues to finance its operating activities are derived primarily from state appropriations, loan repayments and other income.

WEDC operates economic and community development divisions as well as finance and administrative departments primarily in the Madison, Wisconsin location. WEDC provides grants, loans, tax credits and other financial and technical assistance to its customers. WEDC utilizes the Intacct accounting system as well as Salesforce and a grant and loan management system.

IV. Proposal Requirements

Proposers responding to this RFP must provide sufficient responses to all of the below requests for information. Failure to respond to any of the requests may result in disqualification of the proposal.

a. Mandatory Requirements

- i. Explain how you will complete the scope of work and achieve the objectives outlined in this RFP.
- ii. Describe methodology, process for data gathering, and sources of data, including any 3rd party sources. In addition, describe process for collecting information from WEDC and the external stakeholders identified by WEDC that will need to be included in data gathering. It is expected that the selected proposer will provide recommendations for stakeholders that need to be included to ensure we gather comprehensive input from public organizations, academia, and industry.
- iii. Explain ability/willingness to provide access to data in various formats required by WEDC. In addition to Microsoft Excel, describe other formats that are available to access, format and analyze the data.

b. Organizational and Staff Capabilities

- i. Provide a brief description of the proposer's history and organization.
- ii. Describe the proposer's experience.
- iii. Provide a list of at least three relevant engagements held by the proposer which indicates relevant experience.
- iv. Provide a list of all staff persons who will be involved in carrying out the tasks covered by this RFP, describing each in terms of their involvement in specific tasks and qualifications.

- v. Provide a list of any subcontractors (individual or organizational) that the proposer intends to use when providing services under this RFP (Note: the proposer is not required to use subcontractor(s). However, no subcontractor may be used without WEDC's written approval.)
- c. Technical Requirements/Approach to the Project
 - i. Describe, in detail, the proposer's methodology and overall approach to the project
 - ii. Provide a timeline for conducting the work under this RFP.
- d. Other Items

Please describe items not included in the scope of work under this RFP that the proposer recommends be completed. Include the price for any such extra items in the Cost Proposal as additional costs.
- e. Documents
 - i. Provide a copy of the proposer's W-9.
 - ii. Provide a copy of the proposer's standard contract documents.

V. Cost Proposal

Proposers should provide a *fixed cost proposal* for the services to be provided under this RFP, including anticipated out of pocket costs. *The cost proposal should include the estimated number of hours and the billing rate for each level of team member assigned to the engagement. The cost proposal shall be a not to exceed total cost for the services to be provided under this RFP.*

VI. Terms and Conditions

The following terms and conditions affect responses to this RFP and any resulting contract. These terms shall be adhered to by any interested proposer and are non-negotiable.

- a. Contract Term

The contract will remain active until the project is completed and all deliverables have been received and accepted by WEDC.
- b. Confidentiality

Proposer acknowledges that all information, data, records and documents disclosed by WEDC to proposer, or which come to proposer's attention during the course of its response to this RFP or performance under any resulting contract constitute valuable and proprietary assets of WEDC (Confidential Information). Proposer agrees not to disclose the Confidential Information, either directly or indirectly, to any person, entity or affiliate unless required to do so by legal process of law without prior authorization by WEDC. If required to disclose Confidential Information by legal process, Proposer shall provide WEDC with prompt notice so WEDC may seek an appropriate protective order. Except as required to respond to this RFP or during the course of its performance under the terms of any resulting Agreement, proposer shall not use any Confidential Information for its own purposes.

c. Conflict of Interests

Proposers' response to this RFP must include, in writing, disclosure of any potential conflict of interests that may arise from proposers performing services for WEDC. Any resulting contract will require that if the proposer fails to disclose a potential conflict of interest, and if WEDC determines such failure to disclose involves a material conflict of interest, the proposer's contract may be declared to be void by WEDC and any amounts paid under the contract may be recovered by WEDC. Proposers shall advise WEDC of any changes in potential conflicts of interest.

d. Nondiscrimination

Pursuant to Wisconsin law, any contract resulting from this RFP will include the following language regarding nondiscrimination:

In connection with the performance of work under this contract, vendor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in § 51.01(5), sexual orientation or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, vendor further agrees to take affirmative action to ensure equal employment opportunities. Vendor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the nondiscrimination clause.

e. Public Records

Responses to this RFP, any communication with WEDC, and any resulting contract, work product, or other information provided to WEDC by proposer are subject to the public records laws of the State of Wisconsin, § 19.31 et seq. Proposers shall mark documents "confidential" where appropriate for financial and other sensitive materials that should be, to the extent possible, be kept in confidence. WEDC will notify the proposer if it receives a public records request for materials marked confidential.

f. Copyrights and Product Ownership

Proposer acknowledges that, if awarded the contract, the work products that are created under such agreement, which include but are not limited to any data, findings, conclusions, recommendations, and presentation (collectively, the "Work Products") will be deemed Works Made for Hire and are thus the exclusive property of the WEDC, which retains all common law, statutory, and other reserved rights, including copyrights, in and to Work Products. Proposer will also grant WEDC an irrevocable and non-exclusive right to use any work products owned by proposer that are not created under the aforementioned agreement but are needed for WEDC's use of the Work Products as intended under such agreement.

g. Insurance

If awarded the contract, the proposer shall maintain Worker's Compensation, Comprehensive General Liability, including Contractual Liability, and Automobile Liability insurance for any claims that may arise from operations under the contract.

VII. RFP Process

a. Reasonable Accommodations

WEDC will provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request.

b. Communication with WEDC & Submitting Questions

All communication regarding this RFP shall be directed to WEDC's Attraction & Investment Director, Jela Trask, jela.trask@wedc.org. Information regarding this RFP obtained from other sources is unofficial and nonbinding. Communication with other sources may be cause for rejection of a proposal. All questions regarding this RFP must be submitted in writing to WEDC's Attraction & Investment Director, Jela Trask, by February 1, 2022, at 5:00 p.m. CST.

c. Incurring Costs

WEDC is not Liable for any cost incurred by a proposer for responding to this RFP.

d. News Releases

News releases pertaining to the RFP or to the acceptance, rejection or evaluation of proposals shall not be made without the prior written approval of WEDC.

e. Submitting the Proposal

Proposers shall submit an electronic, PDF, version of their Proposal to WEDC's Attraction & Investment Director, Jela Trask, jela.trask@wedc.org, no later than February 18, 2022, at 5:00 p.m. CST. Proposal responses should follow the sequence and outline presented in this RFP.

VIII. Evaluation of RFP

a. Proposal Review, Verification and Acceptance

WEDC shall review each proposal to verify that it meets all specified requirements in the RFP. Proposals that do not comply with instructions contained in the RFP may be rejected by WEDC. WEDC reserves the right to waive a particular specification if no proposer meets that specification. WEDC may request reports on the proposer's financial stability. WEDC may reject a proposal if the proposer is determined to have inadequate financial means to provide the required service. WEDC retains the right to accept or reject any or all proposals, or accept or reject any part of a proposal, determined to be in the best interest of WEDC. WEDC shall be the sole judge as to compliance with the instructions contained in this RFP. Proposals shall be firm for acceptance for ninety (90) days from date of proposal opening unless otherwise noted. A proposer may not modify its proposal after submission except to correct minor omissions or miscalculations as directed in writing by WEDC. At WEDC's discretion, proposers selected as finalists in the vendor selection process may be asked to complete an interview with and/or presentation to WEDC's selection committee.

b. Proposal Scoring

Members of WEDC's selection committee will separately score proposals according to the requirements and capabilities listed in the RFP, assigning a score for each requirement and capability. Scoring will be weighted based on the selection committee's priorities. The selection committee may request finalists to deliver a presentation of their capabilities in person. Proposals will be reviewed by a selection committee. The committee may review references, require oral interviews/presentations and use the results in its review. Mandatory requirements must be met in order for a proposal to be considered for award under this RFP. Evaluation of the proposals will be based on the proposer's relevant experience providing like services, the quality of the team dedicated to this project, the proposer's approach to the project and the project timeline, and proposed fees.

c. Right to Reject Proposals and Negotiate with Proposers

WEDC reserves the right to reject any and all proposals. WEDC may enter into negotiations with multiple vendors regarding the terms of the contract and the cost proposal before determining the highest scoring proposer. WEDC shall not, under any circumstances, reveal a proposer's cost proposal to any other proposer prior to contracting for services.

d. Award Decision

WEDC will make the award to the proposer deemed to provide the services described in this RFP at the best value to WEDC, taking into consideration the proposers' overall quality of work, experience, expertise, and cost proposals.

e. Notice of Intent to Award

All proposers who respond to this RFP will be notified in writing of WEDC's intent to award the contract as a result of this RFP.