

**Strategic Partner Training
RFP MS-FY09-018
Q&A**

Supplier 1:

General Questions

1. Does RTI have a documented partnership model that governs how finance professionals in RTI work with their non-financial partners? If so, can you please provide a copy of that model?

A: No documented model is currently available.

2. Can you describe the culture of RTI in order to better equip us to integrate that into our proposal?

A: To learn more about RTI beyond what is provided in the RFP, please reference RTI's website – www.rti.org

3. What is the structure of the finance department? Is it centralized or decentralized? Are specific finance personnel assigned to specific operating units?

A: RTI has a primarily decentralized finance structure, with finance groups supporting the respective operating business units. RTI also has corporate finance and accounting groups that facilitate the centralization of planning and budgeting functions, perform budgeting support for corporate (G&A) groups, and provide accounting support for the entire organization.

4. Outside of Research Triangle Park, NC, what locations currently house finance professionals that would be part of the target audience? Can you provide the number of individuals by location?

A: Remote staff outside RTP is limited, but RTI has 5 finance personnel in Boston and another 5 in Washington, D.C.

Audience Questions

5. What is the level of experience in the target audience (e.g., less than 3 yrs, 3-5 yrs, 5-7 yrs, over 7 years)?

A: The core of the target audience would be professional staff who are not yet in a management capacity and have 3-5 years of experience. However the broader audience will also include those with greater than 5 years of experience, including some with over 10, and will also include some finance management staff.

6. What is the role of finance "staff" within the department and organization? Similarly, what is the role of finance "managers"?

A: Finance staff within RTI's business units support financial planning, budgeting, reporting, investment cases, and proposals. This support is provided

to RTI's operational and administrative management (center directors, unit and group VPs, and finance management). Accounting staff promote and instill an environment of financial controls and compliance, and support the finance staff through facilitating the availability of financial performance data.

Finance managers coordinate the finance staff and provide a higher level of executive support and leadership.

7. What types of decisions are the finance personnel expected to influence (e.g., contracting, capital budgeting)?
A: The desired training will help finance personnel to be critical business partners to the primary staff that they support (operational, administrative, etc.), including being integral in supporting business strategy, investment decisions, budgeting, project performance and proposal pricing, and proposal prioritization.
8. What are the internal customer needs?
A: Internal customer needs are for financial and analytical support of aspects noted in the response to question 7. There are however different levels of need across RTI. Some customer needs are well aligned and others need to be educated on how finance can help them.
9. How are non-financial stakeholders going to be educated to work with their financial partners post this training in order to ensure that individuals completing this program can demonstrate proficiency in the skill attained in this program?
A: Based on answers provided to question 8, we would like you to provide recommendations.
10. Has RTI considered training both financial and non-financial teams in the same program? Why/Why not?
A: Current focus is on training finance staff. A supplementary recommendation on training for both financial and non-financial staff may be provided, but the primary proposal is for training of finance staff since it is incumbent upon the finance staff to provide the support.

Design, Development, Delivery, and Evaluation questions

11. What is driving the September 30 completion date?
A: This is based on an internal goal. It is not an absolute requirement, but is highly desirable.
12. How does RTI feel about a blended learning approach? Any prohibition against pre-work?
A: There is no prohibition against pre-work. Blended learning will be considered where it is shown to add value and is based on prior success.

13. Can you provide an understanding of how RTI formulated their expectation that this program will be a ½ -to one-day versus a series of programs/learning opportunities?

A: A half to one day training session is typical at RTI and considered desirable. If a service provider has an existing program that exceeds one day and has proven effective, please provide as an option to the base proposal.

14. Will the assigned Finance Lead have a background in technical and federal contracting?

A: The Finance Lead has a background in providing finance support for technical and federal contracting. In addition, the Finance Lead will have access to technical and federal contracting experts within RTI.

15. Will the assigned Lead have examples, case studies, etc. readily available to work with the developer?

A: Case studies can be developed to appropriate link training content with RTI-specific scenarios. Related material will be made available to the developer.

16. ODL partner -- what is the function of that partner?

A: Organization Development and Learning is the training and consulting group of RTI's Human Resource organization. ODL partners with research groups to help them with training and development needs -- identifying training needs and solutions to meet those needs.

17. The RFP references a "manual" for distribution. Does the client seek a reference manual, a participant workbook, or a combination workbook/reference manual?

A: Service provider should give a recommendation on appropriate materials to be provided to course participants. RTI desires that participants will be provided with some form of written material that supports course content and reinforces how to implement key learnings.

18. The RFP asks for recommended class size. What is/are the training venue(s)? Size classroom? Is it conference room, auditorium?

A: RTI has facilities to support training in an auditorium setting or a large conference room, as needed, so venue should not be a constraint for class size. Service provider's recommended class size should be a reflection of the optimal number of participants for a single facilitated session based on prior experience and success.

19. How detailed of a project plan would RTI like the provider to provide and would you prefer the plan to be produced and delivered via MS Project, Excel, and/or PowerPoint?

A: Level of detail provided for project plans shall be up to the discretion of bidding service providers, but must comply with the stated limitations on number of pages submitted. RTI can receive project plans in any of the formats mentioned.

20. How far in advance would the client prefer the 1-2 hour executive overview, and the 2 pilots?

A: Timing will be worked out with the successful bidding service provider based on the course development schedule.

Supplier 2:

1. #3 on Attachment F, Scope of Work mentions that "Instructors shall be available to deliver on RTI's main campus as well as remote locations in the U.S." Could you let me know where the other locations would be?

A: Remote staff outside RTP is limited, but RTI has 5 finance personnel in Boston and another 5 in Washington, D.C.