



REQUEST FOR QUOTES (RFQ)

For

Strategic Planning Consultant

For

LOWER RIO GRANDE VALLEY WORKFORCE DEVELOPMENT BOARD DBA WORKFORCE SOLUTIONS

RFQ ISSUE DATE: Thursday, July 5, 2018 4:30 p.m. CST

RFQ RESPONSE DEADLINE: August 3, 2018 4:00 p.m. CST

Lower Rio Grande Valley Workforce Development Board dba Workforce Solutions is an equal opportunity employer/program and auxiliary aids and services are available upon request to include individuals with disabilities. TTY/TDD via RELAY Texas Service at 711 or (TDD) 1-800-735-2989/1-800-735-2988 (voice).

ABOUT WORKFORCE SOLUTIONS

Workforce Solutions (herein referred to as Board) is the workforce development organization serving Hidalgo, Starr and Willacy counties in Texas. Workforce Solutions is a non-profit 501(c)(3) organization and is led by a locally nominated Board of Directors. The 25 member volunteer board consists of 51% private sector representation. The remaining 49% are comprised of education, community-based organizations, labor, vocational rehabilitation, public assistance, and employment services representatives. The Board is responsible for the planning, oversight, fiscal accountability and evaluation of workforce development services in this region. The Board is supported by the board staff, led by the Chief Executive Officer. Workforce Solutions' practical function, through its workforce centers is to connect business with job seekers, to help improve the skills and abilities of the local workforce, and help the current workforce retain and advance in their employment opportunities.

Workforce Solutions strives to be a highly customer focused organization which continuously improves our business to better serve our customers. At an organizational level, we believe "***our primary customer is business.***"

Mission Statement:

To provide job seekers the skills, and business the talent, they need to be successful.

Purpose:

Leading Change, Connecting People and Improving Potential within our communities

Values:

Integrity

Innovation

Commitment

SCOPE OF WORK

Our 25 member Board of Directors, Board Chair, Board Officers, Chief Executive Officer and Executive Board Staff are soliciting a proposal from experienced consultants in the fields of strategic planning, corporate goals development, facilitation, organizational development and/or corporate executive leadership development/coaching. Workforce Solutions (WFS) is seeking an individual or organization to consult and lead the Board of Directors and staff in a summative review of organizational and community needs and facilitate these groups in the re-design and development of a Corporate Strategic Plan.

The bidder should be prepared to review organizational information and reports, such as but not limited to, WFS Workforce Development Board Program Year 2017-2020 and Texas Workforce Investment Council Report (can be located via hyperlink: <https://www.wfsolutions.org/who-we-are/leadership/board-plan.html>) and the WFS Strategic Planning Process Summary and Recommendations Report, April 2017 (see Attachment D). In addition be prepared to meet (in person or virtually) with board officers and executive staff to gain an understanding of the historical context of the board and organization, assess the current state of the business to better advise on and lead the current strategic planning efforts.

Staff anticipates a close working relationship with the consultant in preparation for a 1 – 1 1/2 day strategic planning session with the Board of Directors tentatively planned for September 28, 2018-September 29, 2018. In addition, the bid should include the consultant's flexibility to work with the organizational executives in preparation for the retreat and to further the development of the strategic plan into an operational tactics in the following weeks.

The scope of work includes, but is not limited to the following activities:

- Work session(s) with CEO and Executive Board staff to shape the strategic planning process and/or event (e.g. agenda, and delivery methods to support outcomes);
- Prepare and facilitate strategic planning event for the duration of 1 ½ day event;
- Develop products needed to foster and facilitate an effective strategic planning event;
- Develop Corporate Strategic Planning Report to summarize strategic planning event and outcomes (e.g. purpose, mission, key strategic imperatives, corporate goals, etc.) and recommended next steps; and
- Present Summary Report to Board of Directors at next scheduled BOD meeting (tentatively scheduled for October 31, 2018).

This work (planning, delivery of strategic planning event, and post reporting) will take place over the course of a four (4) month period beginning August 2018 and concluding by November 30, 2018.

PROPOSED APPROACH:

Interested individuals/organizations please provide a proposal responding to this request to include:

1. Describe your approach to this project.
2. What are your methods for organizational assessment, strategic planning and facilitation?
3. How would you engage stakeholders, facilitate and produce a final strategic plan for the Board of Directors?
4. What role would Board staff and Board Officers have?
5. What is your proposed timeline?
6. Who would be leading and supporting this project?
7. What is the final product you would produce for Workforce Solutions?

CONSULTANT QUALIFICATIONS:

8. Provide the resume and bio(s) for the consultant(s) who would lead the sessions. Include any relevant education, certifications and experience.
9. Provide a listing of the strategic planning projects consultant(s) have led in the past 2 years.
10. What is the length of your experience in organizational development and strategic planning?

DEMONSTRATED EFFECTIVENESS/ PAST PERFORMANCE:

11. Provide 3 references from these customers that we can contact, include names and contact information.

12. Of this list provide a project description, outcomes and your role, for 3 of your most successful and 1 of your least successful.
13. What is your / your organization's experience in consulting/facilitation?

BUDGET/COST:

14. What is the proposed cost for the consulting/facilitating services? If a flat consulting/facilitator fee is proposed, please indicate if travel and lodging expenses are included. If an hourly rate is proposed, indicate what is included in the rate and if travel and lodging expenses are separate, please estimate travel costs. Finally, sum all costs for a total projected cost.

Please provide a proposal responding to this request which includes:

Quotes must be faxed, mailed, e-mailed, or submitted in person to the attention:

Robert Barbosa, CTPM
Finance Manager
Workforce Solutions
3101 West Business 83
McAllen, TX 78501
(P) 956-928-5000
(F) 956-664-8987
robertb@wfsolutions.org

Deadline for Submission: All quotes must be received by Monday, August 3, 2018 at 4:00 p.m. CST and delivered to 3101 West Business 83 McAllen, TX 78501 in order to be considered. They may be submitted by e-mail to robertb@wfsolutions.org, fax (956-664-8987), or in person.

PAYMENT TERMS:

Workforce Solutions will issue a check payable to the vendor(s) within thirty- (30) days of receipt and acceptance of invoice following the provision of services.

SELECTION CRITERIA

Workforce Solutions will evaluate proposals and select vendor(s) on the basis of the following criteria:

EVALUATION CRITERIA

Criteria	Points
Proposed Approach	40
Consultant Qualifications	20
Demonstrated Effectiveness/Past Experience to include at least three references.	20
Budget/Cost	20
Total	100

Should you have any questions, please contact Mr. Robert B. Barbosa, CTPM, at robertb@wfsolutions.org.

The Board may use Board staff, independent evaluators or a combination of both to evaluate and rank quotes.

Workforce Solutions reserves the right to accept, or reject any or all proposals received or to cancel or extend in part or its entirety, this Request for Quotes, or make multiple or partial awards.

A response does not commit Workforce Solutions to award a purchase agreement or contract or to pay any costs incurred in the preparation of a response, nor did to pay for any costs incur prior to the execution of a formal purchase agreement or contract unless such costs are specifically authorized in writing by Workforce Solutions.

ATTACHMENTS

- Attachment A - Certification Regarding Debarment
- Attachment B - Certification Regarding Conflict of Interest
- Attachment C - Listing of Prior Contract
- Attachment D- Workforce Solutions Strategic Planning Process Summary and Recommendations Report, April 2017

ATTACHMENT A

**CERTIFICATION REGARDING
DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, State or local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a government entity with commission of any of the offenses enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Firm

Signature of Authorized Representative

Date

Print Name and Title of Authorized Representative

ATTACHMENT B

CERTIFICATION REGARDING CONFLICT OF INTEREST

By signature of this bid proposal, Bidder covenants and affirms that:

- X No manager, employee or paid consultant of the Bidder is a member of the Board, or an employee of Workforce Solutions;
- X No manager or paid consultant of the Bidder is married to a member of the Board, the CEO, or an employee of Workforce Solutions;
- X No member of the Board, the CEO or an employee of Workforce Solutions is a manager or paid consultant of the bidder;
- X No member of the Board, the CEO or an employee of Workforce Solutions owns or controls more than 10 percent in the Bidder;
- X No member of the Board, CEO, or employee of Workforce Solutions receives compensation from Bidder for lobbying activities as defined in Chapter 305 of the Texas Government Code;
- X Bidder has disclosed within the Bid any interest, fact or circumstance which does or may present a potential conflict of interest;
- X Should Bidder fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Bidder shall not be entitled to the recovery of any costs or expenses incurred in relation to any contract with Workforce Solutions and shall immediately refund to Workforce Solutions any fees or expenses that may have been paid under the contract and shall further be liable for any costs incurred or damages sustained by Workforce Solutions relating to that contract.

Name of Organization/Firm

_____ **Signature of Authorized Representative** _____ **Date**

Print Name and Title of Authorized Representative

ATTACHMENT C

LISTING OF PRIOR CONTRACTS FOR SIMILAR SERVICES

On the following table, list the major contracts or services your organization has provided in the past two (2) years. Note: The table shown below may be reproduced, as needed, to provide the requested information.

Name of Organization	Contract Begin/End Dates	Contract Amount	Detail of Services Provided