Request for Proposals (RFP)

for a Strategic Plan

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| --- | --- |
| RFP Issued | 03/11/2024 |
| Respondents Orientation | **03/18/2024** |
| Notice of Intent to Submit a Proposal Due | **03/22/2024** |
| Final Day to Submit Questions | **03/27/2024** |
| Proposals Due | **04/05/2024** |
| Evaluation Period | **04/08/2024-04/12/2024** |
| Anticipated Award Notification | **04/19/2024** |
| Anticipated Contract Start | **04/30/2024** |

Proposal must be received no later than

04/05/2024 by 5PM

ABSOLUTELY NO EXCEPTIONS

The San Diego Workforce Partnership is an equal opportunity employer and is committed to equal opportunity in its contracting process. Auxiliary aids and services are available upon request to individuals with disabilities.

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# Introduction and Scope of Work

## Purpose of RFP

The San Diego Workforce Partnership (SDWP) has undergone transformation in organizational structure, staffing and culture over recent months. SDWP is now soliciting proposals from qualified contractors to work with SDWP to develop a 4-year Strategic Plan (July 1, 2024 through June 30, 2028) that is inclusive and incorporates views of our staff, governing Boards, funders, private sector and community at large, and that aligns with the core objectives sought as described below.

The Strategic Plan consultations are to also support the required stakeholder consultations for the development of the Local and Regional Plans mandated by the California Workforce Development Board (CWDB).

SDWP extends its employees’ heartfelt and gratitude to Irvine Foundation for their generous contributions to our RFP. Irvine Foundation support plays a pivotal role in advancing our objectives which encompasses a spectrum ranging from SDWP’s values, mission, and vision to strategy.

Pursuant to II. Proposal Submission, Section (C) Pricing Sheet, the estimated amount outlined in the RFP is expected to fall within the range of $85,000 to $110,000 reflecting the scope and requirements of the project outlined therein.

## Scope of Work

## Overview:

* Leveraging current documents, reviewing the latest status of organizational affairs, and conducting a series of extensive consultations across all identified stakeholders, the contractor will be responsible for proposing an update to SDWP’s organizational values, mission and vision statements that will articulate a strong framework for the organization’s strategy, creating a shared and mutual understanding of goals, and establishing key performance indicators and expected outcomes that reinforce accountability to stakeholders and funders alike.
* **Mission & Vision:** Strategic planning starts with a mission that offers a company a sense of purpose and direction. SDWP's Mission & Vision Statement describes who it is, what it does and where it wants to go.
* **Goals & KPIs:**Strategic planning involves selecting goals and key performance indicators. Most planning uses SMART Goals (specific, measurable, achievable, realistic, and time-bound) or other objectively measurable goals.
* **Monitoring & Evaluation:** Strategic planning helps SDWP leaders regularly monitor and periodically evaluate progress against the plan and make changes or adjustments in response to changing conditions.

This assignment will include project management, stakeholder consultation, feedback facilitation, design and execution of a comprehensive planning process, and development of a strategy along with an action plan for implementation.

**The assignment will also support the consultation process for SDWP’s parallel efforts to develop its Local and Regional state-mandated plans. The Regional Plan pertains to the Southern Border Region (SBR) that the Imperial County Workforce Development Board and San Diego Workforce Partnership comprise. It acts as a strategy document for the SBR and should fit cogently with the SDWP Strategic Plan. These plans are guided by an EDD Directive that will be published in the late summer timeframe.**

**These plans will follow similar format and content of the** [**CWDB Strategic Plan**](https://cwdb.ca.gov/plans_policies/2024-2027-state-plan/) **and the previous updates of the** [Southern Border Regional Plan](https://workforce.org/wp-content/uploads/2023/04/Southern-Border-Region-Plan-Update-PY-2023-2024.pdf)  **and SDWP** [Local Plan](https://workforce.org/wp-content/uploads/2023/04/San-Diego-Local-Plan-Update-PY-2023-2024.pdf)**.**

* + This aspect of the work includes three key elements: research; community engagement; and staff engagement. The Local and Regional Plans will aim to have a final draft completed by mid December 2024.

## Phases:

While SDWP seeks the contractor’s recommendations regarding the best process to develop an actionable strategic plan, the organization envisions the assignment being completed in phases.

**Current Status.** A strategic planning cycle starts with the determination of SDWP's current strategic position. This is where stakeholders use existing documents referencing elements of the latest internal strategy (including the mission statement and any long-term strategic goals) to perform assessments of the organization and its environment. These assessments can include a SWOT (strengths, weaknesses, opportunities and threats) analysis to understand the state of the business and the path ahead. The contractor is also expected to engage in comprehensive discussions with groups of staff across different levels to take stock of historic efforts.

**Visioning.** The contractor will then continue extensive conversations with staff, and also engage with community groups and both governing Boards to receive inputs and feedback and present final recommendations for updated mission, vision, and values.

**Prioritize.** Next, the contractor will set objectives and initiatives that line up with SDWP mission and goals and will move the organization toward achieving its goals. There may be many potential goals, so planning prioritizes the most important, relevant, and urgent ones. Goals may include consideration of resource requirements (such as budgets, staff, tools) and often involve a timeline and organizational metrics or KPIs for measuring progress.

**Planning.** This is the main thrust of strategic planning in which the contractor collaborates with SDWP leadership to formulate the steps or tactics necessary to attain a stated strategic objective. This may involve creating numerous short-term tactical organizational plans that fit into the overarching strategy. Additionally, the Strategic Plan should include a broad strategy and accompanying executive summary and a comprehensive, detailed action plan that identifies:

* Shared vision
* Goals
* Objectives
* Strategies
* Tactics
* Responsible partners and their roles
* Measures
* Outcomes

**Strategic Plan should also include:**

* Resource / fundraising development strategies
* Community outreach strategy that aligns with State, County and local Municipal strategic plans
* Communications strategies

**Monitoring & Evaluation (M&E).** A strategic plan is periodically reviewed and revised to adjust priorities and reevaluate goals as organization conditions change and new opportunities emerge. Regular reviews of metrics can happen periodically with adjustments to the strategic plan can occur annually. The contractor will provide recommendations regarding the plan’s M&E and structure support.

**Implementation Guidelines**. Implementation of the strategic plan requires clear communication across the organization with clearly defined roles and responsibilities across teams with established results tracking, measurement and reporting. Implementation typically includes regular reviews with management to ensure that plans stay on track. As part of this work, the contractor will provide clear guidelines for implementation of the Strategic Plan.

## Deliverables

## Strategic Plan:

* A comprehensive, detailed four-year Strategic Plan document (July 2024 – June 2028), estimated 15-25 pages, that includes:
  + An updated Vision, Mission Statement and core Organizational Values
  + Strategic pillars, performance metrics and milestones for achievement with outcome and impact indicators identified
  + Action Plan
  + Budget for implementation and resource requirements for implementation
  + Summary of background documents as part of stocktaking review
  + Summary and conclusion resulting from at least fifteen to twenty (15-20) consultative sessions held in a range of formats (mostly in-person, either individually or in focus groups) with agreed/approved stakeholders including staff, members of governing Boards and partner organizations representing both English and non-English speaking community groups. These consultations are also to coincide with requirements for the parallel upcoming Local and Regional Planning exercise.

## Contract period

SDWP intends to award one contract with a base year that is estimated to commence on 04-30-2024 and end on 12-31-2024.

## Organizational Overview & Governance

SDWP creates opportunities through work, supporting job seekers, and business with a robust suite of resources and services. We consistently seek new ways to align with our communities to identify workforce training needs, skill gaps and emerging industries. Our focus on talent pipeline management has enabled us to better understand employer needs and design career pathways that meet the demands of a rapidly evolving economy.

SDWP is a 501(c)(3) tax-exempt organization chartered by the County and the City of San Diego to fund job training programs in the San Diego region. The organization’s primary funding is allocated by the U.S. Department of Labor (DOL) under the provisions of WIOA and is overseen under the leadership of the Board of Directors which is comprised of the Workforce Development Board (WDB) and the Policy Board. For additional information on SDWP, visit [workforce.org](http://www.workforce.org).

## Eligible Applicants

For-profit and nonprofit organizations, independent contractors, public agencies, consortiums, and/or a collaboration of these organizations are all encouraged to apply. Consortiums, joint ventures, or collaboration of organizations with complementary skills and experience are encouraged to apply, but proposals need to clearly identify one legal entity as the prime respondent that will hold contracting responsibilities and liabilities. Entity not excluded or disqualified through the U. S. General Services Administrator’s System for Award Management (SAM).

## Addenda to this RFP

SDWP may revise any part of this RFP and will release an addendum that will be posted on SDWP’s website, [workforce.org/funding](https://workforce.org/funding/). Respondents are responsible for checking the website to remain informed about the process and any changes that may affect the RFP. If respondents have difficulty or problems accessing the website or downloading information, contact SDWP at [compliance@workforce.org](mailto:compliance@workforce.org).

## Right to Cancel

SDWP reserves the right to delay, amend, reissue or cancel, all or any part of this RFP at any time without prior notice. SDWP also reserves the right to modify the RFP process and timeline as necessary. This RFP does not commit SDWP to accept any proposal or execute an agreement with any respondent, nor is SDWP responsible for any costs incurred by the respondents in the preparation of responses to this RFP. SDWP reserves the right to reject any or all proposals, to accept or reject any or all items in the proposal and to award the contracts in whole or in part as is deemed to be in the best interest of SDWP. SDWP reserves the right to negotiate with any respondent after proposals are reviewed, if such action is deemed to be in the best interest of SDWP.

## Submittal of Proposal

SDWP must receive proposals no later than 04/05/2024 by 5:00PM

PDF versions of written and signed proposals should be sent to [compliance@workforce.org](mailto:compliance@workforce.org) with the title of “San Diego Workforce Partnership’s Strategic Plan”. **Late proposals will not be accepted**.

## Questions and Answers about the RFP

All questions about this RFP must be emailed to [compliance@workforce.org](mailto:compliance@workforce.org) with the name of the RFP in the subject line and we will respond in three business days. The last day to submit questions is March 27, 2024. Information regarding questions and answers will be available on our website.

## Respondents Orientation

A virtual webinar session will be held on 03/18/2024 at 9:00AM. This is an opportunity for potential respondents to request additional clarity on both the current state as well as future state needs.

Link to Orientation: <https://workforce-org.zoom.us/j/86411459854>

Meeting ID: 864 1145 9854

# Proposal Submission

To best evaluate the ability of the contractor to meet our goals, please include the following in your proposal:

|  |  |  |
| --- | --- | --- |
| Section | Section Title | Page Limit(s) |
| A | Cover Page | 1 page |
| B | Proposal Narrative: Organizational Qualifications | 7 pages |
| C | Pricing Sheet | 3 pages |
| D | Conflict Of Interest Disclosure Form | 1 page |

## Cover Page

Include company name, address, phone number, website and federal tax identification number, as well as the name, phone number, email, and electronic signature for the person authorized to negotiate the contract and make decisions for the organization.

1. PROPOSAL NARRATIVE

### Respondent must address the following sections in the proposal narrative:

### Organizational Qualifications and Project Management

Please address the following:

* Please provide an overview of your organization’s experience and qualifications for similar sized projects; includes demonstrating that your organization has sufficient size and depth of management, financial strength, resources, and services to support the need.
* Examples of similar projects and a list of current or former references for whom the proposer has performed similar work.
* Please provide a timeline with key milestones for set-up/implementation of services and roles of responsibilities of contractor and SDWP to achieve each milestone.
* The proposal should include:
  + Understanding of the work to be performed, estimated hours, and other pertinent information.
  + Organization description, size and structure. Indicate whether the firm is a small or woman- or minority-owned business.
* Qualifications of all staff to be assigned to the project and specify the project manager.
* Resumes of staff to be assigned to the project. Education, position in firm, years and type of experience, continuing professional education, etc., will be 4 considered. Vendor is not able to sub-contract out any of the work without the pre-approval of the sub-contractor by SDWP. It is expected that these tasks will be accomplished through a combination of activities, including:
* Background research by consultant on SDWP history and current leadership team, including environmental scan of organization and opportunities ahead.
* Benchmarking our organizations with other similar sized non-profits or additional organizations with similar focus.
* Focus groups, interviews, surveys and/or any other method that will be useful in receiving partner and community input.
* Facilitated group meetings with the board and staff to create consensus regarding a strategic vision and plan.
* Please provide specific risks you see related to this project and how your organization will manage/mitigate these risks through your project management approach.

Responses to this section will be used to determine the organization’s administrative and operational preparedness to deliver the requested services.

### PRICING SHEET:

Respondents will be asked to submit a proposal containing estimates related to reimbursement for the cost of wages and associated expenses (e.g. employer’s portion of social security and Medicare, unemployment insurance, and so on). Prices should be valid for a period of one year. Responses to this section will be used to determine the cost efficiency of the proposal. All pricing information provided in response to this RFP must be accurate, transparent, and inclusive of all applicable taxes, fees, and charges.

### IN PERSON INTERVIEW:

At the discretion of SDWP, highly-ranked respondents may be asked to participate in oral interviews. Respondents will be allowed 30 minutes for oral interviews to walk through their proposed solution. The panel will ask a series of questions to allow respondents to clarify or highlight aspects of their proposal. The respondent’s authorized negotiator or delegate and at least one key technical resource must be in attendance for the oral interview. The respondent is limited to a presentation team of five individuals. Finalists will be notified of interview time slot via email.

# Evaluation Criteria and Contract Award

## Evaluation Criteria and Access to Evaluation INFORMATION

An RFP Evaluation Panel will score and rank proposals and make a recommendation for funding. The selection will be based upon proposal information supplied by the respondent in response to this RFP. Price will be a significant, but not the only, criteria in evaluating the proposals.

The following details the points assigned per section:

|  |  |
| --- | --- |
| Proposal Section | Point Value |
| Organizational Qualifications and Project Management | 40 |
| Work Plan | 30 |
| Cost/Budget | 30 |
| Total Points | 100 |

Consideration will also be given to the following:

* Ability of the contractor to provide all aspects of the proposal.
* Compliance of the contractor and proposal with the project requirements outlined above.
* The extent to which the proposed deliverable meets the scope and goals outlined in the RFP.
* Experience with similar organizations and portfolio of work.

## Contract Award

SDWP will make efforts to utilize small business, women’s business enterprises, and/or minority-owned firms. A proposer qualifies if it meets the definition established by the small business administration.

The RFP Evaluation Panel’s recommendations will be finalized, and all respondents will be notified of the results by 04/19/2024.

### Negotiation/Contract

The respondent’s designated authorized negotiator must be empowered to make binding commitments for the successful respondent and its subcontractors, if any. SDWP reserves the right to negotiate the final terms of the contract agreements with the successful respondent(s). Items that may be negotiated include, but are not limited to, the scope of work, the implementation schedule, and the final award amount. If any respondent recommended for funding fails to provide services outlined in the agreement and proposal, SDWP may use an alternate respondent to perform services upon board approval.

### Cooling off period

SDWP and the Board of Directors shall not approve or contract with, and will reject any bid or proposal submitted by an individual or entity who within the preceding twelve (12) months was themselves or employs anyone who is a current, dismissed, separated, or formerly employed person of SDWP, and:

1. Was employed in any position(s) of substantial responsibility in the area of service to be performed by the contract; or
2. Participated in any way in the negotiations, transactions, planning, arrangements, or any part of the decision-making process relevant to the proposed contract/service agreement, or was or is employed in a role of substantial responsibility in the same general subject area as the proposed contract; or
3. Is an owner, officer, principal, partner, or major shareholder of the proposed subrecipient.

This prohibition will apply to any qualified person(s) leaving employment of SDWP and will apply at all times during the twelve-month period beginning on the date the person left the employment of SDWP and will apply to any procurement issued or contract executed within that twelve-month period. Potential respondents must detail any Cooling Off Period disclosures on the Attachment - Conflict of Interest Disclosure Form. The Board of Directors may, upon a showing of special circumstances that would justify the approval of such a contract, waive this cooling off provision.

## General Provisions

### Contract Terms and Litigation Warranty

The RFP, any addenda, and the respondent’s response shall also become part of the contract agreement between SDWP and the respondent. The respondent shall indicate in its proposal any exceptions that the respondent takes to the terms and conditions in the ATTACHMENT – SERVICE AGREEMENT TEMPLATE or to any of the contents of this RFP. Contract terms required by the respondent must be included or attached to the respondent’s proposal. Respondents, by submitting a proposal, warrant that they are not currently involved in litigation or arbitration concerning their performance as it relates to the same or similar services to be supplied pursuant to the referenced contract and that no judgments or awards have been made against the respondents on the basis of their performance in supplying the same or similar services, unless such fact is disclosed to SDWP in the proposal(s). Disclosure of litigation will not automatically disqualify the respondents; however, SDWP reserves the right to evaluate proposals) based on facts surrounding such litigation or arbitration.

## Appeal Process

Only respondents to this RFP may appeal the results if the procurement process was violated in some manner, and/or Federal, State, and/or SDWP procurement guidelines have been violated. An appeal will not be allowed to contest individual scores, the rating system, disqualification, or dissatisfaction with the evaluation results.

The respondent must submit an appeal within five (5) business days from the date the RFP recommendation is posted on SDWP website. SDWP will render a decision within ten (10) business days of receipt of the appeal.

### Filing an Appeal

The Appeal Resolution timeline begins on the actual day on which the written appeal is received by SDWP.

To appeal, a written letter of appeal must be sent to [complaints@workforce.org](mailto:complaints@workforce.org) including evidence for appeal grounds and specific relief sought.

SDWP will acknowledge receipt of the appeal within one (1) business day of the date of filing.

The EO Officer/Grievance Officer will review the appeal to determine if it meets the criteria for a valid appeal. Acceptance of the appeal will be based on the following:

* Appeal must have been received within five (5) business days from the date the RFP recommendation is posted on SDWP’s website.
* Only Respondents may appeal the results if the procurement process was violated in some manner, and/or Federal, State, and/or SDWP RFP guidelines have been violated.
* An appeal will not be allowed to contest individual scores, the rating system, disqualification, or dissatisfaction with the evaluation results.
* A notification will be sent to the recommended awardee (the winning respondent) and the appellant to advise of appeal investigation and date of when results and next steps will be available.

### Review Panel

* An appeal review panel appointed by the Workforce Development Board Chair will review the appeal to render a decision.
* The panel will review the appeal and collect information. At their discretion, the panel may request a meeting with Respondent and/or SDWP Staff, and/or use other methods to gather relevant information.
* Once all the information is gathered and reviewed, the panel will issue a written decision to the EO Officer/Grievance Officer.

### Notice of Final Action

SDWP EO Officer/Grievance Officer will notify the appellant and the recommended awardee within ten (10) business days of receipt of the appeal. The decision of the appeal will be final.

## Restriction on Disclosure

Confidential information: Any information deemed confidential or proprietary by respondent must be clearly marked and identified by respondent as such and include an explanation of why such information is exempt from disclosure under applicable law.

Such identified confidential or proprietary information will be protected and treated with confidentiality to the extent permitted by law. Information not protected from disclosure by law will be considered a public record.

If respondent does not mark information as confidential or proprietary, SDWP will treat the information as public. All sections of the proposal including attachments are subject to release.

Proposals will be received, maintained and disclosed to the public consistent with the California Public Records Act and the Freedom of Information Act. Proposals will be exempt from disclosure until the evaluation and selection process has been completed. Respondents should be aware that SDWP is required by law to make its records available for public inspection and copying, with certain exceptions (see California Public Records Act, California Government code §§6250 et. seq. and the Freedom of Information Act, 5 U.S.C. §552).

SDWP will not notify respondent of requests for release of information or that SDWP released data unless SDWP receives a request for information previously marked and identified by respondent as confidential or proprietary. If SDWP receives a request for release of such previously marked and identified confidential or proprietary information, SDWP will notify respondent of such request to allow respondent to challenge such request consistent with applicable law.

Respondent, by submission of materials marked confidential or proprietary, expressly acknowledges and agrees that neither SDWP nor the City or County of San Diego will have any obligation or liability to the respondent in the event a court of competent jurisdiction compels the disclosure of these materials.

Any data to be returned should be so marked by respondent and will be returned if not essential to the proposal or contract record.

# Other

## Certificate of Insurance

By submitting a proposal you are agreeing to provide a commercial general liability insurance policy, naming The San Diego Workforce Partnership, the City of San Diego, and the County of San Diego as additional insured, protecting against any and all claims for injury to persons or property, protecting against assumed or contractual liability under this Agreement, and covering negligent acts and omissions of Contractor and Contractor Parties, with such policy to be in the minimum amount of One Million Dollars ($1,000,000.00) per occurrence, and with an aggregate limit of at least Two Million Dollars ($2,000,000.00). Contractor shall provide SDWP a certificate evidencing such insurance. See exhibit – Certificate of insurance (COI) Example.

## Service Agreement Template

By submitting a proposal, you are agreeing to the terms outlined in the Attachment – Service Agreement Template.

## Conflict of Interest

Respondents are required to list any and all individuals who contributed to the preparation of the proposal such as an employee, officer, agent, and relatives including spouses, registered domestic partners, children, siblings, parents, in-laws and step relatives. Disclosure of any actual or potential conflicts of interest relative to this Competitive Proposal is required and shall be included in the Attachment - Conflict of Interest Disclosure Form. All respondents must fill this out and submit if even if there are no actual or potential conflicts of interest.

# Referenced Attachments

**Conflict of Interest Disclosure Form**

**Service Agreement Template**

**Exhibit – Certificate of Insurance (COI) Example**