

Request for Proposals (RFP)
for SDWP Permanent CEO Search Firm Services

RFP Issued	04/29/2024
Proposals Due	05/10/2024
Evaluation Period	05/13/2024-05/17/2024
Anticipated Award Notification	05/27/2024
Anticipated Contract Start	05/31/2024

Proposal must be received no later than
05/10/2024 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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I. INTRODUCTION AND SCOPE OF WORK

PURPOSE OF RFP

The San Diego Workforce Partnership (SDWP) is seeking the services of a search firm to help us recruit and hire our next permanent CEO. SDWP is a \$38M, approximately 150-person, quasi-governmental and non-profit organization focused on workforce development services in San Diego. We serve job seekers and employers through career exploration, work readiness training, occupational training, job placement, subsidized wages and employer engagement. SDWP partners with the San Diego Consortium, a joint powers authority formed by the County of San Diego and the City of San Diego. SDWP's CEO also serves as the Executive Director of the San Diego Consortium.

Pursuant to the Workforce Innovation and Opportunity Act (WIOA), SDWP serves as the designated Workforce Development Board (WDB) for both the County and City of San Diego. The organization is in a transitional phase and is now in process of searching for a permanent CEO. A Joint Personnel Committee (JPC), comprised of members of SDWP's Board of Directors, whose majority is comprised of members from the private sector, and members of the San Diego Consortium's public Policy Board, has been formed to lead the search process and make the final hiring decision. The JPC is now looking for a search firm that has the expertise, experience and resources to assist in identifying and recruiting a qualified permanent CEO for the organization.

SDWP extends its 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.

SCOPE OF WORK

OVERVIEW:

1. Based on the provided job description for the permanent CEO position, develop and implement a speedy, national recruiting strategy to identify and attract qualified candidates.
2. Screen and assess candidate resumes and applications, conduct initial interviews, choose top 5-7 candidates and provide written summaries of each candidate's qualifications and suitability for the JPC to interview next.
3. Facilitate the next stage of the interview process for the JPC, including scheduling, coordinating logistics, and conducting background and other reference checks.
4. Assist with the offer and acceptance process as needed.

CONTRACT PERIOD

SDWP intends to award one contract with a base year that is estimated to commence on 06-01-2024 and end by 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 San Diego Consortium Policy Board. For additional information on SDWP, visit 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. 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.

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 05/10/2024 by 5:00PM

PDF versions of written and signed proposals should be sent to peopleandculture@workforce.org with the title of "SDWP CEO Search Firm RFP." **Late proposals will not be accepted.**

QUESTIONS AND ANSWERS ABOUT THE RFP

All questions about this RFP must be emailed to peopleandculture@workforce.org with the name of the RFP in the subject line and we will respond in three business days.

II. 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: Qualifications, Process and Timeline	5 pages
C	Pricing Sheet	1 page
D	Conflict of Interest Disclosure Form	1 page

A. 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.

B. PROPOSAL NARRATIVE

Respondent must address the following sections in the proposal narrative:

1. Organizational Qualifications and Project Management

1. A brief introduction of the search firm, including a description of the firm's experience and qualifications in providing CEO level search services nationally.
2. A list of similar projects that the firm has completed in the past, including the size of the organization and the positions recruited.
3. An outline of the firm's recruitment methodology, including how they identify and attract qualified candidates.
4. A description of the screening and assessment process that the firm will use to evaluate candidates.
5. A detailed timeline and project plan for the search process.
6. A proposed fee structure for the search services.
7. A list of references, including contact information for previous clients.

C. 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.

D. 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.

III. 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: Experience and qualifications of the search firm in providing CEO-level search services.	30
Work Plan: Ability of the search firm to engage key stakeholders in the process, recruitment methodology and screening process, proposed timeline and project plan for the search process.	40
Cost/Budget: Proposed fee structure for the search services.	30
Total Points	100

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 05/31/2024.

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:

- a) Was employed in any position(s) of substantial responsibility in the area of service to be performed by the contract; or
- b) 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
- c) 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

1. 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 compliance@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 §§ 7920.000 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.

IV. 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.

V. REFERENCED ATTACHMENTS

Conflict of Interest Disclosure Form
Service Agreement Template
Exhibit – Certificate of Insurance (COI) Example