



REQUEST FOR PROPOSAL (RFP)
STRATEGIC PLANNING SERVICES

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REQUEST FOR PROPOSAL (RFP)

INTRODUCTION

The Golden Sierra Workforce Development Board (GSWDB) is the Governor's designated workforce board for Placer, El Dorado, and Alpine Counties under the federal Workforce Innovation and Opportunity Act of 2014 (WIOA). GSWDB aids system partners by providing direction on how best to assist businesses develop talent pipelines and jobseekers by acquiring the education, credentials, and skills to obtain work in careers that pay a living wage.

The organization is a private sector-led Board, appointed by the Chief Local Elected Officials who represent their respective counties on the Golden Sierra Governing Body. Business members represent healthcare, manufacturing, IT, insurance, construction and other valued sectors. Public sector members represent youth, education, social service, labor, government, and economic development agencies. The current roster of Board members is available at www.goldensierra.com.

ABOUT GSWDB:

Organization's Current Mission Statement and Vision:

Mission:

The Golden Sierra Workforce Development Board convenes industry leaders and key partners to identify workforce initiatives, create innovative solutions, and measure the success of systems' ability to meet industry and workforce needs.

Vision:

A fully integrated workforce system that capitalizes on the expertise of industry and workforce partners to continuously meet the needs of business, and facilitate pathways to success for students, workers and job seekers.

PURPOSE OF SOLICITATION:

Golden Sierra Job Training Agency (GSJTA) has initiated a Request for Proposal (RFP) process to identify qualified contractors to provide strategic plan services to the Golden Sierra Workforce Development Board (GSWDB). In general, the plan services will consist of developing mission and vision statements and facilitating discussion for a strategic plan document spanning three years and preparing a concise strategic plan document for the use and guidance of the Agency's Management and Workforce Development Board.

SCOPE OF WORK:

GSWDB is seeking a contractor to provide the following services:

- Work with the Executive Committee, the Workforce Board, the Governing Body, and GSJTA staff to articulate a clear 3 year strategic plan providing a collective vision that the board, partners, and staff will operationalize.
 - This plan should revisit the GSWDB's mission and vision and either reaffirm or create a new shared mission and vision that will serve as the framework for this new phase of planning.
 - The plan should define specific strategies for collective action for the Board to pursue for the next three years.
 - In order to ensure systems alignment, the contractor will need to evaluate identified stakeholder plans thereby reducing duplication, and leveraging other partner efforts for the success of the workforce board actions.
 - Conduct a general SWOT analysis that engages key stakeholders (Board Members, GSJTA staff, and partner agencies) with appropriate research instruments to evaluate the Board's strengths, weaknesses, opportunities, and threats.
 - Develop a timetable of implementation with specific benchmarks that provide the framework for the Board to operationalize.
 - Identify clear, measurable outcomes to gauge organizational and strategic effectiveness and impact.
 - Establish a framework for the organization's leadership to effectively implement the strategic plan and monitor progress toward goals.
 - Facilitate all meetings, provide leadership, direction, expert consultation and advice related to the development of an effective and implementable strategic plan.

The final deliverables will include:

- A report detailing a clear, customized 3-year strategic plan that:
 - Identifies a shared Mission and Vision
 - Defines Board goals and objectives that are specific, measurable, achievable, relevant, and time-bound
 - Clearly articulates the approach to be used in accomplishing goals & objectives
 - Provides a timeline for implementation, and
 - An evaluation methodology
- The provision of ongoing support during the regularly scheduled Board meeting

PROJECT REQUIREMENTS:

- GSWDB is seeking proposals from vendors who are capable of providing all of the above services and who can provide additional expertise to help the organization achieve a successful strategic planning outcome.
- While GSWDB understands that completing this project requires significant and active Board and staff involvement, it is important to note that the candidates selected will be responsible for completing all project work products and final deliverables (e.g. writing organizational assessments, writing the actual strategic plan, etc.)
- Candidates are to propose which aspects of the project will require Board and/or staff involvement and include the expected time requirements for all activities involving their participation.
- Proposals must include a clear description of the vendor’s plan to complete all of the project components (i.e. in what order the project will be completed, how long each component will take to complete, etc.)
- Vendors must include in their project timelines “check-in” points for GSWDB to be provided with status updates.
- The successful vendor will be responsible for setting up the check-in meetings/calls, providing work product/deliverables to the GSWDB for dissemination to key team members in advance of these check-in points, preparing an agenda for each meeting/call, and sending out meeting invites.
- In addition to the check-in meetings, the vendor will be expected to present a status update on preliminary findings and recommendations prior to the writing of the final project deliverables and strategic plan.

IMPORTANT DATES:

RFP Release	Wednesday, June 19, 2024
Last Day to Submit Questions	Friday, July 5, 2024
Final Q&A Posted	Monday, July 8, 2024
Deadline to Submit Response	Wednesday, July 10, 2024 by 5:00pm PT
Workforce Board Approval	Thursday, July 18, 2024
Governing Body Approval	Thursday, July 25, 2024
Award Announcemen (tentative)	Friday, July 26, 2024

This RFP may be updated at any time, without notice, to promote successful outcomes and ensure compliance with applicable rules and regulations.

QUESTIONS:

Questions regarding this RFP and/or the submission process should be directed in writing to keefe@goldensierra.com. All questions must be submitted by July 5, 2024. To ensure a fair and objective evaluation, answers to all questions will be posted on the agency’s website at <https://goldensierra.com/wdb/proposal-requests/>.

SUBMISSION INSTRUCTIONS:

While additional information may be presented, the following elements are required:

1. **Cover Sheet** (Attachment A)
2. **References** (Attachment B)
3. **Sample Project Plan** including:
 - a. Project stages.
 - b. Specific activities to be conducted at each stage.
 - c. Milestones and deliverables relating to those activities.
 - d. Identification of anticipated potential strategic plan issues and description of
 - e. Respondent's approach to resolving.
4. **Cost Proposal** - The Cost Proposal shall contain all pricing information relative to performing the strategic plan services engagement as described in the RFP including:
 - a. A schedule of estimated hours and associate rates for each proposed engagement team member. This would be the billing rates for various positions that may be utilized for services requested by GSJTA. Rate changes must be authorized by the GSJTA in writing and specified in the agreement between the contractor and GSJTA. The cost proposal shall also include:
 - i. All direct and indirect costs, inclusive of out-of-pocket expenses, to provide an all-inclusive, not-to-exceed cost.
5. **Proposed Work Schedule**
 - a. Proposed timeline to complete the various phases of the project.

Submission elements

Submittals should consist of the elements identified above and should not exceed 20 pages. The Cover Sheet must identify the person to whom all further correspondence and/or question should be addressed, including the individual's e-mail address and telephone number.

GSJTA reserves the right to reject any or all responses, to waive any informality in the specifications or RFP process, or to cancel in whole or in part the RFP if it is in the best interest of GSJTA to do so.

GSJTA shall create an evaluation committee. The evaluation committee will review and analyze all responses, contact references, complete interviews as necessary, and select the vendor best able to meet the agency's needs.

Submission Method

All submittals must be signed and dated by a duly authorized official(s) representing the vendor. All proposals not signed and dated will be deemed non-responsive.

Proposals must be submitted electronically to:

Melissa Keefe, Administrative Analyst keefe@goldensierra.com

All proposals must be received on or before:

Wednesday, July 10, 2024 at 5:00 p.m.

Late proposals will not be accepted. Exceptions will not be allowed and there is no appeal for not meeting the proposal deadline.

If you have any questions, please contact Melissa Keefe. In compliance with applicable procurement guidelines, all questions and answers will be posted on the agency's website.

FORMAL CONTRACT:

The applicant(s) selected to provide services will be required to enter into a standard service agreement with Golden Sierra. A template is available on the agency's website at <https://goldensierra.com/wdb/proposal-requests/>. Applicants are encouraged to review the standard service agreement prior to submitting proposals in order to be familiar with the contracting requirements.

Applicants are advised that Golden Sierra will require subcontractors to publicize the fact that particularly services are funded, in whole or in part, by Golden Sierra. All contracts will contain a provision requiring the contractor to abide by this requirement.

SUPPLEMENTAL DOCUMENTS:

All applicants that successfully pass the evaluation process will be required to submit a CA Form 590, W-9, and proof of insurance. Only verification of insurance is required at this point; endorsement will be required if applicant is selected to provide services.

PROTEST PROCEDURES TO RESOLVE PROCUREMENT DISPUTES:

All protests to resolve disputes concerning this RFP shall be submitted in writing, must specify in detail the grounds of the protest, the facts and evidence in support thereof, and the remedy sought. The written protest must be delivered to the Golden Sierra within the time limits provided below. In the absence of a timely and properly submitted written protest, no party responding to this RFP shall be eligible for any remedy.

Any applicant desiring to protest a determination concerning this RFP or the recommendation of GSJTA staff, must file a protest, in writing, no later than five (5) calendar days following release of the staff recommendation. The Golden Sierra Executive Director shall resolve any protest based upon the written protest and any oral and written response thereto provided by GSJTA staff. Any resolution of the protest shall be deemed final.

Appeals

- An appeal of a denial of award can only be brought on the following grounds:
 - Failure of GSJTA staff to follow the selection procedures and adhere to requirements specified in the RFP or any addenda or amendments;
 - There has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq;
 - A violation of State or Federal law.
- Appeals will not be accepted for any reasons other than those stated above.
- Appeals must be sent to:

**Golden Sierra Job Training Agency
Attn: Executive Director
115 Ascot Drive, Suite 140
Roseville, CA 95661**

- Accepted appeals will be processed and reviewed by the Executive Director.
- The Executive Director will consider only those specific issues addressed in the written appeal.

LIMITATIONS:

Golden Sierra shall not pay for any costs incurred by the applicant agency in the completion of this proposal. Submission of proposals does not, in any way, obligate Golden Sierra to award a contract.

Golden Sierra reserves the right to accept or reject any proposal, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP, if it is in the best interest of Golden Sierra to do so.

Golden Sierra may require successful applicants to participate in contract negotiations and to submit additional programmatic or financial information as a result of negotiations prior to contract finalization. Golden Sierra shall reserve the right to terminate, with or without cause, any contract entered into as a result of this RFP process.

AVAILABLE FUNDING:

Federal funding disclosure: Golden Sierra's Workforce Innovation and Opportunity Act (WIOA) programs are funded by a grant award (AA411006) totaling \$2.93 million (100%) from the US Department of Labor with \$0.00 (0%) financed from non-federal sources.

MODIFICATION OF CONTRACTS:

Any contract awarded pursuant to this RFP may be unilaterally modified by Golden Sierra upon written notice to the contractor under the following circumstances:

- Contractor fails to meet performance and service expectations set forth in the contract; or
- The Federal or State government increases, reduces, or withdraws funds allocated to Golden Sierra, which impact services solicited under this RFP; or
- There is a change in Federal or State legislation and/or their regulations, local laws, or applicable Golden Sierra policies or procedures.

SUBCONTRACTING:

Subcontracting for specialized, technical portions of services, may be permitted upon approval of the evaluation team. In such instances, applicants must clearly delineate in the proposal any plans to subcontract, identify the nature and scope of any planned subcontracting activity, and identify and verify the capability of the proposed subcontractor(s). Golden Sierra reserves the right to approve the form and content of all subcontracts.

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STRATEGIC PLANNING SERVICES

COVER PAGE

Applicant (Name of Individual or Organization)		Employer Identification Number	
Physical Address	City	State	Zip
Remittance Address	City	State	Zip
Designated Contact Person	Title		
Phone	E-Mail		

Approval of Authorized Representative

Authorized Representative (Typed Name)

Signature

Date

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2. References:

In the table below, provide 3 references who can attest to the applicant's knowledge, experience, and capacity to provide strategic planning services.

Reference	Award Information		
Name and Contact Information	Period of Performance	Services Provided Outcomes and Outputs	Total Award

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