



WorkSource

MONTGOMERY

Connecting Employers & Job Seekers

Serving Montgomery County, Maryland

STRATEGIC PLANNING SERVICES REQUEST FOR PROPOSAL

Release Date: December 2, 2022

Proposals Due: December 23, 2022 at 12:00 pm ET

Contract Period: January 1, 2023 – June 30, 2023*

December 2022

WorkSource Montgomery Inc.

**A one-year extension from July 1, 2024 – June 30, 2025 may be possible based on performance.*

WorkSource Montgomery (WSM), its programs and contract service providers are Equal Opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Programs and initiatives offered by WSM are supported in part by the Workforce Innovation and Opportunity Act, Montgomery County and the American Recovery Plan Act.

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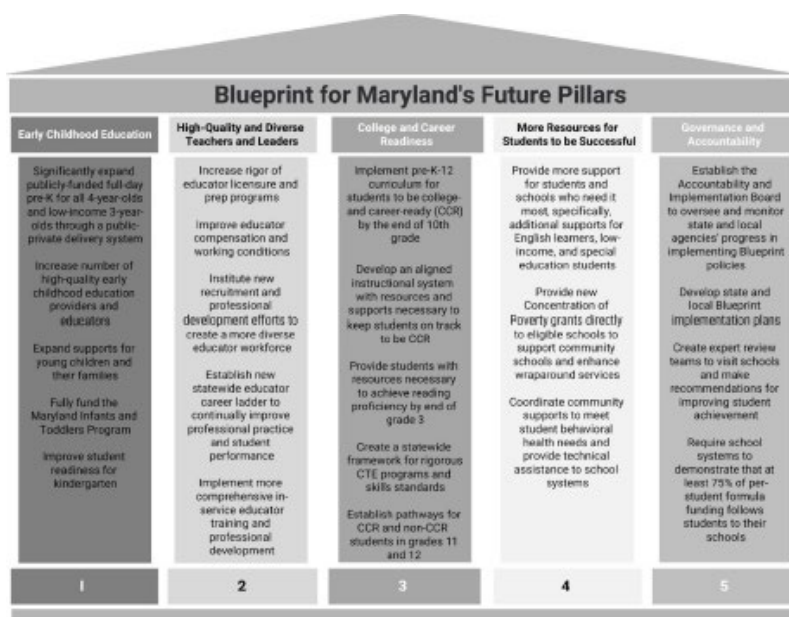
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SECTION 1: PROGRAM DESCRIPTION & BACKGROUND

1. Blueprint for Maryland's Future

The Blueprint for Maryland's Future, as it was formally named in 2019, is a set of policies and dedicated funding that is intended to transform Maryland's early childhood, elementary, and secondary education system to the levels of high-performing systems around the world.

The Blueprint for Maryland's Future policies are grouped into five policy areas - called pillars. These pillars are shown in the pillar graphic, which includes key implementation expectations.



Pillar 3 focuses on College and Career Readiness and Objective #4 mandates that Local Workforce Development Areas will provide career counseling services for all Middle and High School students enrolled in the local workforce development (LWD) service area. As a result, WorkSource Montgomery will supply career counseling services for approximately 90,000 students starting in the 2023/2024 school year.

WorkSource Montgomery has issued this Request for Proposal to secure Strategic Planning Services from an entity that has extensive experience planning and the development of system-wide school career counseling services.

2. WorkSource Montgomery

[WorkSource Montgomery](#) (WSM) focuses on linking local and regional economic development and workforce efforts in Montgomery County, Maryland. WSM develops a deep understanding of target and emerging industry demands, creating sustainable workforce solutions that are tailored to the region. This increases the ability of individuals to compete for higher-quality jobs and employers to compete within the marketplace.

Vision:

- Economic development, education, and the system of talent development are aligned locally and regionally to sustain a vibrant economy in Montgomery County.

Mission:

- To meet the talent attraction, development, and retention needs of strategic industries.
- To meet the needs of the underemployed and unemployed.
- To develop career pathways that lead to sustainable wage jobs and support a thriving mission.

WorkSource Montgomery's Roles:

- We catalyze change in the community to build an effective workforce development system.
- We are a community facilitator and convener to identify issues and act collectively with partners to address them.
- We act as an intermediary/broker between the supply and demand sides of the workforce system about current and future skill needs to ensure mutually beneficial relationships and outcomes.
- We advocate addressing workforce development issues at the local, state, and national levels.

3. RFP Overview

Through the Blueprint for Maryland's Future Legislation, WorkSource Montgomery has been mandated to develop and deliver Career Counseling Services for all Montgomery County Public School Middle and High School students. The intent of the Strategic Planning Services RFP is to identify an organization with clearly documented experience in the planning and implementation of Career Counseling Services in a K-12 Public School System. The strategic plan must be consistent with the intent and deliverables specified in Pillar 3, Objective 4 of the Blueprint. For additional information, organizations may refer to the (Draft Blueprint Comprehensive Implementation Plan: <https://drive.google.com/file/d/1RG4cKH9o64-pilDqkTfMLwMK5ARjvGhq/view>)

While the Blueprint specifically assigns Pillar 3, Objective 4 to WorkSource Montgomery, the legislation also mandates that WSM will work in close collaboration with Montgomery County Public Schools, the local community college (Montgomery College) and other stakeholders in the community. As a result, in addition to demonstrating successful planning of age and stage-appropriate career counseling services based on best and evidence-based practices, the selected consulting firm's proposal must articulate a history of collaboration with stakeholders and a plan to engage partners to ensure successful implementation.

4. Target Populations

WorkSource Montgomery's mandate is to provide individualized career counseling services to all Middle and High School Students enrolled in Montgomery County Public

Schools. Current enrollment shows approximately 87,000 students in these grades. The legislation does not exclude any special populations from being eligible for these services. The plan should account for the delivery of career counseling services to all students including but not limited to:

- immigrants, refugees, or asylees
- Opportunity Youth
- justice system involved
- individuals with disabilities
- English language learners
- are undocumented residents

5. Eligible Applicants

Eligible applicants include non-profit or for-profit companies, entities, or consortiums of entities. Key factors to determining any applicant's eligibility is documentation demonstrating:

- At least 10 years of experience delivering strategic planning and implementation of career readiness services in a K-12 ecosystem.
- Integration of best and evidence-based practices into career counseling programming in partnership with public school systems.
- Developing standards-based interactive assessments and supporting blended learning environments.
- Examples of originally designed career readiness resources including but not limited to online tools, web platform, print materials, and professional learning.

Applicants must be registered in the System for Award Management Exclusions (SAM Exclusions) system maintained by the General Services Administration (GSA)³ and be authorized to do business in the state of Maryland.

Additionally, all applicants must provide proof of insurance, including:

- General liability \$1,000,000 occurrence
- Hired/non-owned auto \$1,000,000
- Workers compensation \$100,000
- Additional insurance on general liability and commercial automobile liability: MCWDB and WorkSource Montgomery
- Waiver of subrogation

Upon award, the successful bidder will be granted a five-day period to acquire any additional proof of insurance required for the proposed program.

The applicant must be able to demonstrate relevant previous experience, staffing capacity, and the commitment to successfully implement or expand a program or initiative.

All applicants must disclose any potential conflicts of interest arising from their relationships with training or other service providers.

For more information on registering, including a registration checklist, please see: <https://sam.gov>.

Further, WSM will declare entities ineligible if they are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any State or Federal department or agency. Respondents must disclose any legal judgments, claims, arbitration proceedings, lawsuits or other legal proceedings pending or outstanding (unresolved) against the organization, its owners, officers, or principals. Respondents must comply with Section 504 of the Rehabilitation Act of 1973, the Federal Drug-Free Workplace Act of 1988, and the Americans with Disabilities Act to be eligible.

6. Project Timeline & Funding

The table below provides a timeline of activities for this procurement. In the event dates are changed, WSM will provide notice through our website: <https://worksourcemontgomery.com/about/procurement>

Activity	Date
RFP Release	12/02/2022
Deadline for Bidder Questions	12/09/2022 by 4:00 pm ET
Response to Bidder Questions Posted	12/14/2022
Proposal Deadline (email submission only)	12/23/2022 by 12:00 pm ET
Notification to All Bidders	12/28/2022
Contract Begin Date	01/02/2023

WorkSource Montgomery will notify contract awards to the successful respondent effective no later than December 28, 2022.

- Subject to performance and funding availability, the selected contractor(s) may be eligible for up to one (1), 1-year extension with amended scope of work and updated budget subject to WSM approval.
- Budget line items require detailed explanation.
- All funding of this RFP is contingent upon WSM fund availability and may change based on increases/decreases in federal, state, or local allocations, de-obligation of funds, new initiatives, and decisions of WSM.
- For the awarded contract, the submitted proposal, with any negotiations, will become part of the official contract file. Any commitments made in the proposal will be part of the contract and will be binding on the contractor.
- The contract will be awarded as a **line-item cost reimbursement**. No expenses are reimbursable until a contract or letter of authorization has been issued to incur costs as of a specific date. Grantees will submit invoices by the 10th of each month. Provided all required documentation is in order, vendors can expect payment within 30 days thereafter. Examples of supporting documentation for payroll may include payroll registers, receipts, and bill summaries that detail components reflecting costs used on the project.

- Up to ten percent of the requested funds may be utilized for administrative costs. Administrative costs are those that are not related to the direct provision of services to participants and employers. These costs can relate to either personnel or non-personnel. Examples may include but are not limited to costs associated with systems and functions related to accounting, financial, property management, personnel management, payroll, and monitoring.
- No matching funds are required for consideration. However, applicants are welcome to include information about additional funds that are leveraged to support the proposed programs and services.
- WSM recognizes that some personal technology resources may be needed to achieve program goals. Durable equipment costing more than \$5,000 or other large capital investments will not be approved for funding.
- The issuance of this solicitation in no way commits WSM to pay any cost for the preparation and submission of a proposal. The Bidder assumes all costs of preparation of the proposal and any presentation necessary for the proposal process.
- WSM may elect to reject all proposals if scope of work is not adequately addressed, fund request is not appropriate for scope of services, or for other reasons deemed appropriate by WSM.

SECTION 2: SCOPE OF WORK

I. Organizational Experience & Capacity (20 points)

1. Describe your organization's mission, goals, activities, accomplishments, and expertise. Identify the number of years that your organization has been in business under the present name, as well as related prior business names.
2. Describe the organization's experience and success in delivering Strategic Planning Services related to Career Readiness in K-12 public education settings.
 - a. Provide detailed information regarding your organization's experience contracting with federally funded and/or education agencies for the same or similar services.
 - b. Include current and past contracts that were in effect within the last three (3) years. Specify whether such contracts are currently in effect, were successfully completed, or were terminated prior to completion.
3. Describe the organization's staffing plan and include an organizational chart.
 - a. What are (or will be) the qualifications of all key management and program staff who will conduct the proposed services? Describe expertise in managing, coaching, and motivating students with unique needs and significant barriers.
 - b. For positions already filled, attach a current resume of the staff person serving in such capacity. Indicate the percentage amount of the position's total work time to be devoted to this project.

II. Research Supported Programming (15 points)

1. Describe your organization's vision for career readiness in a public education

- setting focused on the age and stage appropriate services.
2. Support your vision with evidence-based research combined with examples of successful implementation.
 3. Document how your organization's vision and supporting research aligns with the Blueprint for Maryland's Future.

III. Partnerships & Community Engagement (15 points)

1. Describe how your plan would engage stakeholders and legislatively mandated partners.
2. Describe any other community partnerships needed to ensure successful implementation of the program service delivery model (described in detail below).
3. Describe how you plan to engage parents and guardians of the Middle and High School Students.

IV. Strategic Planning Model (25 points)

1. Provide a detailed treatment of how your organization would produce a Strategic Plan to effectively implement the requirements of the Blueprint for Maryland's Future Pillar 3, Objective 4. Include how that plan would integrate your research-based vision for career counseling.
2. Describe WorkSource Montgomery's role in the development of the Strategic Plan.
3. Describe the mandated partner's role in the development of the Strategic Plan.
4. Describe the employer community's involvement in the development of the Strategic Plan.
5. Include a timeline for completion of the Strategic Plan by the March 15 deadline as set out in the Blueprint for Maryland's Future Legislation.
6. Describe how your organization envisions its role as WorkSource Montgomery transitions from planning to implementation.
7. Describe any technology or other resources that would have to be developed to support the integration of key elements of the strategic plan.

V. Technology, Data, & Reporting (10 points)

1. Describe the data collection WorkSource Montgomery will need to implement to demonstrate the efficacy of WSM's approach to Pillar 3, Objective 4 of the Blueprint.
2. Describe past success with tracking program performance and/or outcomes. Include a description of previous performance measures and outcomes from other successful initiatives.
3. Describe your experience with capturing and reporting performance information.
4. Will your proposed planning process require data sharing agreements with other agencies to accurately report on participant outcomes? If so, please describe how you will obtain and enforce such agreements to ensure quality data and reporting.
5. Describe your organization's approach to management of information systems, connectivity, and confidentiality?

VI. Financial & Fiscal Capabilities & Budget (15 points)

1. Describe your organization's experience in managing federal and/or state funds, philanthropic grants, and other types of financial resources.
 - a. Please include the experience of currently employed fiscal staff have in administering such programs.
2. Describe how your organization ensures compliance with Federal financial management standards.
 - a. How will financial information be made available for monitoring and auditing purposes?
3. Explain your anticipated per-participant cost levels for the proposed program.
 - a. Please include reasoning behind this in the Budget Narrative.
4. The amount requested through this Request for Proposals will be submitted by completing the Budget Form (Attachment C).
 - a. The Budget Narrative must be typed and placed in the proposal following the Budget Form (Attachment C). The amount requested should at no point in time exceed the amount of the contract. The Budget Narrative should provide a detailed description of each line item. Administrative costs and indirect cost rates should not exceed 10%. Additionally, funds cannot be used for capital improvement or to purchase real estate or large equipment. Clearly identify the use of any in-kind services or description of leveraged funds being used to support the activities.
 - i. Provide reports for your organization's last two years of audits. (For applicants without an audit report, providing the two most recent years of filed Form 990s and the IRS 501(c)3 determination letter will be sufficient.)

SECTION 3: SUBMISSION & EVALUATION

1. Bidder's Questions

WSM will accept written questions via email only to <mailto:procurement@worksourcemontgomery.com> through 4:00PM Eastern on Friday December 9, 2022. "Strategic Planning Services RFP" must be written in the subject line. WSM will publish all questions and answers on its website, <https://worksourcemontgomery.com/> by 5:00PM EST Wednesday, December 14, 2022. No information will be provided to individual proposers. An entity's failure to submit a complete proposal or to respond in whole to RFP requirements will result in the proposal being deemed non-responsive and thus ineligible for funding. WSM reserves the right to cancel this procurement at any time, for any reason.

2. Proposal Instructions

The Scope of Work should be completed entirely, should not exceed 15 pages, and be typed in 12-point font, single-spaced, 1" margins on all sides, page numbers, and table of contents. Once completed, interested parties must submit their proposal electronically as one PDF file to WSM at procurement@workforcemontgomery.com. The subject line

should read: *WorkSource Montgomery Strategic Planning Proposal*. Please organize your proposal in the following manner for each component:

- Attachment A: Cover Page
- Attachment B: Conflict of Interest Form
- Attachment C: Budget Form & Narrative
- Attachment D: Reference Form and Letters
- Proof of Insurance
 - See Section 1.5 of this RFP for details
- Documentation of Organization Registration
 - For non-profits, an IRS Tax Exemption Verification letter is required
- Documentation of good standing with the State of Maryland
- Organizational Chart & Staff Resumes
- Two Years of Audited Financial History or equivalent
 - See Section 2.VII.4.a.i (Scope of Work, Financial & Fiscal Capabilities & Budget) of this RFP for details
- Proposed Scope of Work

Bids that fail to follow this order risks losing points in their overall score.

3. Evaluation and Award

Proposals will be evaluated by WSM to ensure each submission meets all criteria outlined in this RFP. The procurement team will develop and use a scoring matrix that is agreed upon by WorkSource Montgomery to evaluate each proposal. Each section of the Scope of Work is worth the following number of points:

Section	Points
Organizational Experience & Capacity	20
Performance & Accountability	15
Partnerships & Community Engagement	15
Program Service Delivery Model	25
Technology, Data, & Reporting	10
Financial & Fiscal Capabilities & Budget	15
PROPOSAL TOTAL	100

All items that are mandatory (e.g., inclusion of attachments, financials, etc.) are considered pass/fail.

4. Notice of Award

All respondents will be notified by email as to their award status. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to: procurement@worksourcemontgomery.com. Unsuccessful respondents are encouraged to re-apply for future opportunities.

5. Appeals Process

Any disagreements resulting from this procurement process can be addressed to: Nate' Gordon, Deputy Director, Administrative Services, ngordon@worksourcemontgomery.com. Appeals must be made within 14 calendar days of notification of non-award.

6. Fiscal Review

WorkSource Montgomery will work with their finance team to conduct a fiscal review of all finalists to review proposal budgets, organization audits, and responses to questions related to fiscal operations. WorkSource Montgomery reserves the right to review and request further information regarding the respondent's financial situation. WorkSource Montgomery reserves the right to assess the risk posed by any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event that might affect an organization's ability to operate the requested program.

7. Past Program Performance

WSM may review a respondent's performance on any previous and/or existing grant agreement(s) as well as check references submitted from other grantors. Achievement of grant agreement outcomes, along with compliance with programmatic and fiscal guidelines and timelines may be evaluated. The review team may perform an in-depth evaluation of all responsive proposals based upon the criteria herein. Prior to its final funding decision, WorkSource Montgomery may also: 1) meet with representatives of the responding entity to discuss the proposed program and budget; 2) identify and/or negotiate program or budget changes the responding entity must make as a condition of funding; and 3) identify other documentation the entity must provide as a condition of funding.

8. Accessibility and Equal Opportunity

WSM is committed to equal access for all customers to all services. All contractors must ensure equal opportunity to all individuals. No individual shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any Workforce Innovation and Opportunity Act or American Rescue Plan Act funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, sexual orientation, political affiliation or belief. All entities are expected to demonstrate full compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws. This includes ensuring contract staff receive accessibility training and may involve developing accessibility plans. All respondents must ensure all written materials and communications include the

statement: "Reasonable accommodations and auxiliary equipment and services are available upon request."

ATTACHMENT A: COVER SHEET

Please complete this **mandatory** cover sheet accordingly.

Organization Name				
Address				
Phone Number				
Number of Years in Business				
FEIN #				
DUNS #				
Acknowledgement that Proposing Entity is up to date on taxes and not currently debarred or suspended.	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Type of Organization (check all that apply)				
Contact Person				
Contact Person's Email Address				
Signatory Authority Signature				

Proposed Budget Amount:

\$ _____

ATTACHMENT B: CONFLICT OF INTEREST FORM

By submitting a proposal, the authorized signatory authority of the bidding entity certifies to his/her knowledge and belief that there is no conflict of interest (real or apparent) inherent in the bid or in delivering the scope of work if WorkSource Montgomery awards a contract. A conflict of interest would arise if any individual involved in the preparation of this proposal and delivery of services has a financial or other interest or would be likely to gain financially or personally from the award of a contract. The same would hold true for any member of the individual's family, partner, or an organization employing or about to employ any of the above as a direct result of the successful award of a contract under the RFP. WorkSource Montgomery reserves the right to disqualify a bidding entity should a conflict of interest be discovered during the solicitation process.

Signatory Authority Name	Signature	Date
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*Note: This form is a **mandatory** required document to be considered for the contract.*

ATTACHMENT C: BUDGET

Please complete the **mandatory** budget form and narrative explanation below for applicable line items.

Consultant Hours/Rate	\$
Consultant Allocated Benefits (if applicable)	\$
Consultant Travel (Should be consistent with GSA Per Diem and Travel Policies)	\$
Operational (supplies, communication, etc.)	\$
Technology Costs	\$
	\$
	\$
	\$
Other Program Costs	\$
Administrative or Indirect Expenses	\$
TOTAL BUDGET REQUEST	\$

Budget Narrative: Please provide a detailed explanation for each budget line item to justify the cost. Examples of explanations include job titles, wage rate, hours worked/charged, types of benefits and rates, estimated mileage/visits to locations, office and other supplies, and agency program operation or program costs.

All funding of this RFP is contingent upon WorkSource Montgomery and/or partner agreements having fund availability and may change based on increase/decrease in allocations, de-obligation of funds, new initiatives, and decisions of the WorkSource Montgomery.

ATTACHMENT D: REFERENCES

Bidders are required to provide three letters of references who can verify their experience, along with a contact phone number or email. References should be for experience in the past 5 years.

Reference #1 Name: _____

Title and Organization: _____

Phone # and email: _____

Reference #2 Name: _____

Title and Organization: _____

Phone # and email: _____

Reference #3 Name: _____

Title and Organization: _____

Phone # or email _____

List the agency contact information for all current contracts or contracts for the past 3 years. Do not duplicate those listed as references.