



WorkSource

M O N T G O M E R Y

Connecting Employers & Job Seekers

Serving Montgomery County, Maryland

INVITATION FOR BID FOR
DEVELOPMENT OF DIVERSITY, EQUITY, AND
INCLUSION (DEI) STRATEGIC PLANNING,
PROGRAMMING AND EDUCATION CONSULTANT

Release Date: October 17, 2023

Proposals Due: November 15, 2023, at 3:00 pm ET

Contract Period: January 2, 2024 – May 30, 2024

WorkSource Montgomery, Inc. (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 Montgomery County and the American Recovery Plan Act.

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1. Invitation for Bid

WSM is seeking an experienced DEI consultant to work with the WSM staff and Board of Directors to develop a DEI Strategic Plan. The DEI Strategic Plan will but isn't limited to evaluation of WSM's current organizational, programmatic, and board practices related to DEI. Development of an equity framework or scorecard. Identification of relevant training opportunities to assist WSM in promoting a DEI culture and effective DEI practices into daily operations and organizational strategies.

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.

Section II: Services Requested

1. Scope of Work/Services Requested

The consultant will engage WSM leadership and Board in defining WSM's organizational elements of DEI, relevant KPIs, DEI priorities, and a case for necessary organizational changes through completing the following:

- A. Conduct an in-depth assessment of WSM's policies, procedures, and practices to identify areas where diversity, equity, and inclusion can be improved including a full review of all agency functions.
- B. Based on the assessment findings, work collaboratively with agency leadership to develop a comprehensive DEI strategic and action plan.

- C. Design and deliver DEI training programs for agency staff, board members, and other stakeholders.
- D. Collaborate with agency leadership to develop or revise policies and procedures that promote diversity, equity, and inclusion.
- E. Review and enhance workforce development programs and curriculum to ensure they are inclusive and address the unique needs of diverse populations.
- F. Collect and analyze data related to diversity, equity, and inclusion within the agency.
- G. Establish mechanisms to monitor and evaluate the effectiveness of DEI initiatives and adjust as needed.

Period of Performance

WSM requests a proposal for the period from January 2, 2024, through May 30, 2024

Section III: Submission & Evaluation

1. Eligible Applicants

- A. The consultant should have relevant experience in working with nonprofit, public and private sector organizations to develop DEI plans that respond effectively to internal, environmental, political and fiscal realities.
- B. Knowledge of DEI Principles: A deep understanding of diversity, equity, and inclusion concepts, theories, and best practices is essential. This includes knowledge of systemic bias, cultural competency, power dynamics, social justice, and intersectionality.
- C. Training and facilitation experience: Experience in designing and delivering DEI training programs, workshops, and educational sessions is valuable. Consultants should be skilled facilitators who can create an inclusive learning environment and engage participants effectively.
- D. Cultural competence: Understanding and appreciating diverse cultures, perspectives, and experiences is critical for a DEI consultant. Should be able to navigate different cultural contexts, demonstrate respect for all individuals, and recognize the importance of intersectionality in addressing inequities.
- E. Experience working with agencies that deliver impactful services in the areas of workforce development, human services, education, treatment, health care, family services, housing, or other human services is preferred.

F. Application Process

Selected bidders must submit proposals on or before **November 15, 2023, at 3:00 pm ET** to procurement@worksourcemongomery.com. Emails with attached proposals must have the subject line “WSM DEI Strategic Plan [Organization or Consultant Name].” Late or incomplete proposals will not be considered. Proposals must contain all the components listed below in the same general order provided. Strong proposals will demonstrate a full understanding of the requirements described in this IFB and validate the capacity, expertise, and certifications to meet WSM’s standards and goals.

Note: *Bids that fail to follow this order or are missing components may not be considered.*

A. Cover Sheet and Front Matter

- Use Cover Sheet template provided in Appendix A.
- Complete Conflict of Interest Form in Appendix B.
- Provide documentation of:
 - i. Good standing with the State of Maryland
 - ii. Good standing with SAM.gov
 - iii. Proof of licensure
 - iv. Proof of insurance

B. Executive Summary

- Include a description of the proposed services and proposed annual cost.
- Describe the organization’s qualifications, brief history, and alignment with the services requested. If applicable include ownership statuses of the firm if minority owned, woman owned, or locally owned in Montgomery County, MD.
- Describe the key personnel to be utilized on the contract, attach their resumes, and indicate their level of expertise and prior experience relevant to requested services.

C. Management Plan

- Describe how your Firm will obtain a basic understanding of WSM’s operations and activities for DEI strategic planning.
- Describe the Consultant’s approach, including review of internal evaluations.
- Describe required assistance from WSM’s staff, if other than outlined in the IFB.
- Provide a sample timeline for field work and delivery of a final report(s). Describe approach and timeline for implementation.

D. Past Performance

- Provide two examples of past performance with similar scope of the services listed in this IFB.
- Include the name and address, period of performance, and points of contact with relevant contact information for each example provided. (Use template provided in Appendix C)

E. Proposed Pricing

- Pricing should be itemized similar to the presentation in Section II.1 “Scope of Work/Services Requested” and provided with a monthly or annual cost proposal for these services.

2. Questions

All questions or requests for additional information must be emailed in writing to procurement@worksourceomtgomery.com with the subject line “WSM DEI IFB Questions” by October 30, 2023, at 5:00 pm ET. Questions received after this date and time will not be answered. Responses to submitted questions will be posted on the “Procurement” page on the WorkSource Montgomery website by November 6, 2023, at 5:00 pm ET.

3. IFB Timeline

The table below provides a timeline of activities for this procurement. In the event dates are changed, WSM will post an updated timeline to the procurement website.

Activity	Date
IFB Release	10/17/2023
Deadline for Bidder Questions	10/30/2023
Response to Bidder Questions Posted	11/06/2023
Proposal Deadline (email only)	11/15/2023
Review of Submitted Proposals Completed	11/30/2023
Notification to All Bidders	12/08/2023
Contract Start Date	01/02/2024

4. Review and Selection Process

Bids in response to this IFB should be completed entirely, should not exceed 5 pages, and be typed in 12-point font, single-spaced, 1” margins on all sides, with page numbers, and table of contents. Submit completed proposals electronically via email in PDF file format to WorkSource Montgomery at procurement@worksourceomtgomery.com with the subject line: “WSM DEI Strategic Plan [Organization / Consultant Name].”

The table below shows the total value of potential scoring in each section of the proposal:

Section	Points
Cover Sheet and Front Matter	10
Executive Summary	20
Management Plan	30
Past Performance	20
Proposed Pricing	20
Proposal TOTAL	100
Interview if applicable	25
GRAND TOTAL	125

Following proposal review, up to three organizations may be contacted for an interview with WorkSource Montgomery’s procurement proposal review committee.

5. Notice of Award

All respondents will be notified by email as to their award status by December 8, 2023. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to: Nate' Gordon, Deputy Director, Administrative Services WorkSource Montgomery, ngordon@worksourcemontgomery.com.

Attachment A: Cover Sheet

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

Organization Name	
Address	
Phone Number	
Number of Years in Business	
FEIN #	
DUNS #	
Contact Person	
Contact Person's Email Address	
Signatory Authority Signature	

Proposed Pricing:

\$ _____

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 IFB. 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: Completion of this form is **mandatory** to be considered for contract award.*

Attachment C: 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 _____