



# WorkSource

## MONTGOMERY

*Connecting Employers & Job Seekers*

*Serving Montgomery County, Maryland*

**INVITATION FOR BID (IFB)**  
**FOR**  
**PREPARATION OF MONTGOMERY COUNTY**  
**LOCAL WORKFORCE DEVELOPMENT PLAN**

Release Date: February 14, 2024

**Proposals Due: March 14, 2024, at 3:00 pm ET**

**Contract Period: April 1, 2024 – September 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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## Section I: Organization, Description and Background

### 1. Invitation for Bid

WSM is seeking an experienced Consultant to assist WorkSource Montgomery (WSM) and Montgomery County's Local Workforce Development Board (WDB) to develop the 2024-2028 Montgomery County Local Workforce Plan. The plan will serve as Montgomery County's strategic plan outlining the vision and priorities as it relates to the public workforce development system for Montgomery County, MD. Some sections of the previous and current plans may be used, but WSM's goal is to rewrite the current plan to include more strategic elements.

### 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

WorkSource Montgomery, Inc. (WSM) is seeking support to write and prepare its Local Workforce Development Plan as required by the Workforce Innovation and Opportunity Act (WIOA). The plan will serve as the strategic document that supports the Montgomery County Workforce Development Board (WDB) vision and priorities as it relates to workforce development within the county and coordinated services. Some sections of the previous and current plans may be used, but WSM's goal is to rewrite the current plan to include more strategic elements.

## **Project Requirements**

### **Task 1: Project Launch**

Upon executing the contract, the consultant will facilitate a project launch virtual call with WSM leadership to discuss the scope of work, roles and responsibilities, and project timelines and deliverables. During this meeting, the goal will be to:

- Define what success means for the project.
- Identify foreseeable challenges during the development of the plan (e.g., stakeholder participation, data gaps, board priorities, etc.)
- Brainstorm appropriate stakeholders to invite for engagement sessions and identify potential calendar dates for engagement.

A communication schedule will be confirmed to ensure project updates are shared regularly.

### **Task 2: Asset Inventory & Data Review**

Following the project launch call, the consultant will collect all documents relevant to the Local WIOA planning process. This includes but is not limited to the existing plan (e.g., WSM Local Area Workforce Plan 2020-2024), data reports, and planning guidelines.

The consultant will then begin a framework of the plan based on the Local Planning Guidance for the most recent Program Year (PY) from the Maryland Department of Labor. This framework will serve as our guiding tool for developing WorkSource Montgomery's Local WIOA plan. We will identify new sections added to the planning guidance and cross-reference existing sections to simplify the planning process.

The consultant will review Maryland Department of Labor's guidance and collect applicable labor market information data, as necessary. This may include demographic data, labor force statistics, job postings analytics, etc. A reputable data source, e.g., Litecast, will be leveraged to collect and analyze relevant data. Where applicable, the consultant will leverage public data sources such as U.S. Bureau of Labor Statistics, U.S. Census Bureau, Maryland Department of Labor Office of Workforce Information and Performance (OWIP), etc.

### **Task 3: Partner Engagement**

Based on the planning guidance, the consultant will facilitate a partner discussion with various stakeholder groups e.g., WDB members, community organizations, businesses, or local chambers, etc. The consultant will work closely with WSM Executive Leadership to identify which planning guidance sections require the greatest input from partners. Rather than entirely rewrite WorkSource Montgomery's Local WIOA plan, the consultant will identify which sections can simply be updated and which sections require a complete rebuild. Before engaging partners, the consultant will facilitate a call with WSM's leadership to dissect the plan framework. The consultant will share the planning document and identify which sections need updated and of those sections, which can WSM provide updated content. The remaining sections will require input from partners.

The consultant will facilitate a minimum of three (3) virtual 2-hour engagement sessions with partners of the local workforce system during their regularly scheduled meeting or during a special meeting. The consultant will provide partners with questions prior to the engagement so that they are aware of the information needed of them and how they directly coordinate workforce services to the local workforce area. Questions will be organized by partner organization (e.g., education, vocational rehabilitation, supportive services, etc.). For partners who will not be in attendance, The consultant will provide the opportunity for them to submit their responses electronically to ensure the draft is complete.

#### **Task 4: Draft Local Plan**

The consultant will analyze and incorporate the findings from Task 3 into the draft plan. In addition, the consultant will include update the labor market information for the draft. A first draft of the plan will be shared with WSM for review. Following the review, the consultant will schedule a virtual meeting with WorkSource Montgomery to review sections in the plan that have not been addressed or need further clarity. In these instances, the consultant will request additional information or contacts in the County workforce system who can assist in responding to those sections. The consultant will then resume drafting of the plan until all requirements are satisfied.

#### **Task 5: Final Review**

Following the draft of the plan, the consultant will prepare the plan for final review by WorkSource Montgomery. The consultant will facilitate one (1) virtual meeting in which there will be an in-depth walk-through of the plan section-by-section to ensure all information is correctly captured and if necessary, real-time edits will be made.

Upon approval by the executive leadership, including the WDB's Executive Committee, the consultant will prepare the plan for submission. This will be in accordance with federal and state requirements and prepared using state policies and templates, as appropriate. The plan will be posted for a 30-day public comment period and if necessary, the consultant will incorporate comments into the plan following the public comment period. The complete finalized plan will be made available for review by the WDB for approval. Once approved, the plan will be submitted to the Maryland Department of Labor. If the state identifies necessary edits in the plan, the consultant will be available to assist WSM with those changes beyond the term of this agreement.

#### **Task 6: Addendums**

In addition to the required components for the plan, WSM will work with the consultant to add six (6) addendums to the plan. The addendums will be related to the core priorities for WSM and the WDB. These priorities are System Building, Community Engagement, Business Engagement, Talent Development, Career Education, and Diversity, Equity & Inclusion. These addendums should be concise (2-3 pages) and provide the public with an easily readable document outlining WSM's strategy for the above-mentioned topics.

#### **Period of Performance**

WSM requests a proposal for the period from April 1, 2024, through September 30, 2024.

### **Section III: Submission & Evaluation**

#### **1. Eligible Applicants**

- The Consultant should have relevant experience in working with nonprofit, public and private sector organizations to develop and prepare Montgomery County Local Plan documents.
- Extensive knowledge of the requirements of the Workforce Innovation and Opportunity Act (WIOA) for the Montgomery County Workforce Development Board.
- Full understanding of Local Planning Guidance per Maryland Department of Labor (MDOL).

## Application Process

Bidders must submit electronic proposals, in PDF file format, on or before **March 14, 2024, at 3:00 pm ET** to [procurement@worksourcemontgomery.com](mailto:procurement@worksourcemontgomery.com). Emails must have the subject line “WSM Local Plan Development IFB” [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 Attachment A.
- Complete Conflict of Interest Form in Attachment 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 (must not exceed three (3) pages)**

- 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 and indicate their level of expertise and prior experience relevant to requested services.

### **C. Management Plan (must not exceed five (5) pages)**

- Describe how your Firm will obtain a basic understanding of WSM’s operations and activities for workforce development 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 submission of final document.

### **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 Attachment C)

### **E. Proposed Pricing (must not exceed two (2) pages)**

- Pricing should be itemized by task, as shown in Section II.1 “Scope of Work/Services Requested” with an estimated hourly or monthly cost, totaled.

## 2. IFB Questions

All questions or requests for additional information must be emailed in writing to WSM Procurement at [procurement@worksourceomtgomery.com](mailto:procurement@worksourceomtgomery.com) with the subject line “WSM Local Plan IFB Questions” by February 21, 2024 at 3:00 pm ET. Questions received after this date and time will not be answered. Responses to submitted questions will be returned to bidders by email by February 28, 2024, 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	2/14/2024
Deadline for Bidder Questions	2/21/2024
Response to Bidder Questions Posted	2/28/2024
Proposal Deadline (email only)	3/14/2024
Review of Submitted Proposals Completed	3/21/2024
Notification of Award to All Bidders	3/22/2024
Contract Start Date	4/1/2024

### Review and Selection Process

Bids in response to this IFB should be completed entirely, including IFB attachments, 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](mailto:procurement@worksourceomtgomery.com) with the subject line: “WSM Local Plan IFB [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
<b>Proposal TOTAL</b>	<b>100</b>
Interview if applicable	25
<b>GRAND TOTAL</b>	<b>125</b>

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

## 4. Notice of Award

All respondents will be notified by email as to their award status by March 22, 2024. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to: Ms. Nate’ Gordon, Deputy Director, Administrative Services WorkSource Montgomery, by email at [ngordon@worksourceomtgomery.com](mailto:ngordon@worksourceomtgomery.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.

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Signatory Authority Name

Signature

Date

*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: \_\_\_\_\_