

## Request for Proposal | Strategic Planning Process

Workforce Development Board of Central Ohio [www.wdbco.org](http://www.wdbco.org)

### INTRODUCTION

The Workforce Development Board of Central Ohio (WDBCO) is a 501c(3) nonprofit designated as the workforce board for Franklin County under the federal Workforce Innovation and Opportunity Act of 2014 (WIOA). WDBCO aids employers by developing talent pipelines and jobseekers by acquiring the education, credentials, and skills to obtain work in careers that pay a living wage. The Board is responsible for the administration of WIOA funds in Ohio's Area 11.

The organization is governed by a private sector-led, 27-member Board appointed by the Franklin County Board of Commissioners and the Mayor of the City of Columbus. Business representatives include healthcare, manufacturing, IT, insurance, and financial services sectors. Other members represent education, social service, labor, government, and economic development agencies. The current roster of members of the Board is available at [WDBCO.org](http://WDBCO.org). WDBCO employs eleven (11) full-time staff members and two project consultants.

The Board is the backbone organization of the workforce system in Franklin County. WDBCO leads strategic thinking about talent pipeline development, leads the Workforce Advisory Council (made up of several of the most established organizations in the workforce space), and collaborates with key industry sectors to address workforce issues.

The Board operates the Ohio Means Jobs Center of Columbus Franklin County ([www.omjfcf.org](http://www.omjfcf.org)). Operation and services of OMJFCF are contracted and are competitively bid at a minimum of every four (4) years. The current contract is held by Equus Workforce Services and two community organizations – Goodwill Columbus and the Columbus Urban League. An infographic that provides an overview of WDBCO activities is available for download here: <https://www.wdbco.org/news-resources-2/state-of-the-workforce-2022/>

WDBCO last completed a strategic plan in 2019.

### ABOUT WDBCO

Organization's Mission Statement and Purpose:

**Mission Statement:** WDBCO is a forward-thinking workforce board providing our community with the essentials for work and providing our employers with the necessary talent to be successful.

**Vision Statement:** Economic prosperity for all through a thriving workforce prepared to meet the needs of today's employers and tomorrow's opportunities.

## **ABOUT OUR NEEDS**

WDBCO is seeking a consultant to provide the following services:

- Work with a Strategic Planning Committee, composed of Board Members and Staff, to articulate a clear strategic plan for 2023-2026 that articulates a collective vision that board staff will operationalize.
  - This plan should use WDBCO's mission and vision as the framework for this new phase of planning.
  - The plan should define specific strategies for sector focus and programming, communication, fund development, and collective action for the organization to pursue for the next three years.
  - The plan should strengthen the Board's role as the backbone of the workforce system in Franklin County
- Outreach to key stakeholders of the WDBCO (Board, Staff, Contract Partners, Community Partners, Employers and Jobseekers) with appropriate tools to evaluate WDBCO's success in achieving its mission and goals.
- Conduct a general SWOT analysis of internal and external perceptions of the organization and its work.
- Develop a timetable of implementation with specific benchmarks that provide the framework for staff 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, and expert consultation and advice related to the development of an effective and implementable strategic plan.

**The final deliverable** should be a clear strategic planning roadmap, evaluation methodology, and a timeline for implementation.

## **PROJECT REQUIREMENTS:**

- WDBCO 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 WDBCO 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 WDBCO 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 WDBCO 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.

**TIMELINE:**

- Monday, November 14, 2022: RFP Released
- Tuesday, November 29, 2022: Questions Submitted
- Wednesday, December 7, 2022 @ 5 pm EST: RFP Submission Deadline
- Tuesday, January 2, 2023: Vendor Selected
- January/ February 2023: Discovery
- March 2023: Final Plan

**QUESTIONS AND SUBMISSION**

Questions and Final Submission should be made to **[rfp-proposal@wdbco.org](mailto:rfp-proposal@wdbco.org)**

**EVALUATION CRITERIA**

The proposal must include an executive summary of the work to be completed. Please also share a detailed project plan and budget outline.

In contracting a vendor to develop a long-range strategic plan for the organization, WDBCO will examine several factors and criteria, including:

- The extent to which the proposal clearly describes the scope of work.
- Specific plans or methodology to be used to perform the services.
- Qualifications and experience of the consultant in providing strategic planning development.
- Ability to adhere to the timeline detailed above.
- Ability to deliver quality work within the Project Budget parameters.

WDBCO reserves the right to adjust these criteria at any time.

## **EVALUATION PROCESS**

### **PHASE ONE: Proposal Meets Mandatory Minimum Requirements**

- All Vendors must meet the following mandatory minimum requirements:
- Experience running a strategic planning process for another non-profit (or similar) organization.

### **PHASE TWO: Proposal Evaluation**

- WDBCO will evaluate proposals meeting the mandatory minimum requirements and select at least two finalists.

### **PHASE THREE: Interviews**

- WDBCO will interview finalists in person or via video conference. The Vendor with the highest score during this interview will proceed to the next evaluation phase.

### **PHASE FOUR: Reference Checks**

- WDBCO will conduct reference checks with three Vendor references asking standardized questions and follow-up questions, as needed. The finalist passes or fails the reference check evaluation phase. If they fail, WDBCO will conduct reference checks on the next highest scoring finalist.

## **VENDOR REFERENCES**

- Please submit three named references (with contact name, title, telephone number and email address) demonstrating prior experience providing similar services requested in the RFP. WDBCO may consider references other than those supplied by the Vendor.

## **APPLICATION PROCESS & PROCEDURES**

Please provide a complete written response to this RFP, not exceeding 5 pages. Proposals should include:

1. A brief Executive Summary, including past experiences and approaches in conducting Strategic Planning.
2. A description of the candidate's general approach to strategic planning consultation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking.
3. How the consultant will address the strategic aims to be examined at WDBCO.
4. A list of project deliverables with a detailed timeline for each deliverable and overall project completion.
5. A detailed budget that breaks out expenses. **Please** clearly define each fee for the tasks related to this RFP, including proposed staff and their hours to complete the final deliverable. WDBCO will not reimburse for any other Vendor costs.
6. Credentials and qualifications of key personnel who will take responsibility for working

directly on this project, including three references.

7. Example(s) of a finished strategic plan created by your company.

Candidates must submit one electronic copy of the proposal. Please note that WDBCO will not return any proposals it receives and will not reimburse candidates for any costs they incur in developing their proposals.

WDBCO reserves the right to:

- cancel the procurement process at any time.
- reject any and all proposals.
- contact any Vendor to clarify their proposal.
- change the statement of work included in this RFP.
- select and reject any portion of a Vendor's proposal.
- check references other than those provided by proposing Vendors.

#### **CLARIFICATION OF REQUEST**

Communications with WDBCO will be accepted via email only, to the Chief Executive Officer. Questions must be submitted by 11/29/22. A Q&A document will be posted by 11/30/22.

#### **COST OF PREPARATION OF RESPONSE**

Expenses incurred in preparing and presenting a proposal to WDBCO are the sole responsibility of the Vendor and may not be charged to WDBCO in any way.

#### **EQUITY, DIVERSITY, AND INCLUSION**

WDBCO gives preference to firms that certify that have in place a policy and practice of preventing sexual harassment and discrimination against employees who are members of a protected class as well as advancing equity, diversity, and inclusion in the workplace.

#### **PUBLICITY**

WDBCO is responsible for all the publicity about this procurement process and any matters associated with procuring, planning, and executing the strategic plan. At no time shall a Vendor create or participate in any publicity related to this project without prior written permission from WDBCO.