

Workforce Florida, Inc.

Invitation to Negotiate for Occupational Training Program Governance Study

January 19, 2012

PURPOSE. The purpose of this Invitation to Negotiate (ITN) is to elicit responses from professional organizations interested in contracting with Workforce Florida, Inc. (WFI) to provide professional advisory and technical assistance services to review and analyze the history and usage Florida's Targeted Occupations List (TOL) processes and to provide the Workforce Florida, Inc. (WFI) Board with legislative and workforce policy recommendations for improvement.

One of the six strategic goals identified in WFI's Strategic Plan "[*Creating the Strategy for Today's Needs and Tomorrow's Talent*](#)" 2010-2015 is "Top National and State Leadership for the Demand-Driven Solution." One of the achievements under this goal, relates to the flexibility of resources - "sufficient funding enables greater flexibility with fund usage, which is essential as workforce needs change over time and demand different priorities." Programs need to be flexible and adaptive to the marketplace. To help Florida reach this goal, WFI is seeking consultancy for review, analysis and recommendations for the realignment of the current Targeted Occupations List processes that are relevant to today's workforce and economy.

The business of Workforce Florida, Inc. includes designing and implementing strategies that help Floridians enter, remain and advance in the workforce becoming more highly skilled and successful, benefitting Florida business and the entire state. The best and most reliable source of information on jobs of today and tomorrow is the demand side. In Florida, the demand-side solution means programs to advance the workforce are derived from employer data. Workforce Florida is governed by a business-led Board, appointed by the Governor. The Board seeks to design strategies to develop Florida's talent and respond to workforce demands and challenges, both today and on the horizon. Representation from a majority of private-sector businesses ensures that business influences workforce policy and investment to drive employment, training and economic development. It is important to ensure that businesses, as ultimate customers of the workforce system, are integral participants in developing and implementing policies and programs of that system, and that the workforce system is designed with the needs of employers, as well as employees, in mind.

As specified in s. 216.136(7), F.S., Florida's current Workforce Estimating Conference (WEC) develops official information on the workforce development system planning process as it relates to the personnel needs of current, new, and emerging industries determined as needed by the state planning and budgeting system. The designated principals of the Conference include representation from the Executive Office of the Governor, Office of Economic and Demographic Research, the Florida Senate and the Florida House of Representatives. As mandated in Florida law, the principals are required to meet in February and August. In August*, the WEC publishes a Statewide Demand Occupations List. The Workforce Florida

Board then reviews and formally adopts through Board of Directors' action to use the WEC's Statewide Demand List to define specific occupations needed for the workforce system and through a defined process develops and publishes a statewide and regional Targeted Occupations Lists (TOLs). These lists govern the provision of training programs through regional Individual Training Accounts (ITAs) provided to individuals needing training assistance within the workforce system in compliance with federal and state law. Current WFI policy, as well as legislative mandates, limits individual training accounts to only those occupations listed on the TOL.

*Workforce Estimating Conference Materials, August 2011

1. Labor Market Update: <http://edr.state.fl.us/Content/conferences/workforce/LaborMarketUpdate.pdf>
2. Florida Employment Projections through 2019
(<http://edr.state.fl.us/Content/conferences/workforce/index.cfm>)
3. Employment Projections thru 2019:
<http://edr.state.fl.us/Content/conferences/workforce/EmploymentProjections2019.pdf>
2012-13 Florida Demand Occupations List summary:
<http://edr.state.fl.us/Content/conferences/workforce/2012-13FloridaDemandOccupationsList.pdf>

The current Workforce Florida TOL process** has been in place since 1998 and given the deep recessionary period, the high levels of unemployment in the state, and forecasted slow recovery, the process has been considered by some as antiquated. There is a need to have a process that is relevant for the 21st century economy and workforce needs.

**<http://www.workforceflorida.com/Publications/TargetedOccupationsList/WFITOLProcessChart.pdf>

The research/analysis should address the following:

- Is the current TOL process meeting the needs of today's marketplace and does it accurately represent the kinds of jobs Floridians should be training for?
- Is there a method by which WFI can secure more private industry sector input on their key occupations of concern, and denote if these occupations are appropriately listed?
- Is there a method by which WFI can analyze the benefits of shorter-term training versus longer-term training?
- How can WFI advocate for industry-recognized certifications within this process? To which occupations are these certifications aligned?
- How can current processes be revamped to better respond to structural changes in the economy and to meet the needs of the regional workforce boards?
- How are other states/nations identifying gaps between North American Industry Classification System (NAICS), Standard Occupational Classification (SOC) and Classification of Instructional Program (CIP) codes and what is industry seeking in terms of skill sets?

- What would data collection beyond NAICS, SOC, CIP look like and how could this data leverage the historical context of NAICS, SOC and CIP? Could this data be integrated into current survey/data collection?
- Would independent data collection in support of the state's targeted clusters be cost effective? How long would this data be valid?
- What novel approaches could be instituted to combine the strength of traditional approaches with new data to reflect modern markets?
- What, if any, legislative or policy changes are needed?
- What, if any, changes need to be made to current WFI policy on the TOL process?

Respondents should be prepared to offer solutions to each issue identified, including modifications needed to existing laws, rule, policies and other governance documents. Additionally, potential respondents should be prepared to interpret and analyze the information gained from the research.

Workforce Florida anticipates surveys of collaborative partners, regional workforce boards and others will be conducted. WFI intends to use the information and data gained through this research study to guide sound improvement to workforce development policy and planning.

BACKGROUND. WFI is the public/private corporation established by the Florida Legislature to provide policy direction and general oversight to the state's workforce development system. As established in Chapter 445, Florida Statutes, this workforce system is comprised of the WFI Board, the Department of Economic Opportunity which serves as the administrative and fiscal entity for the Board, the 24 local regional workforce boards, and a host of other state and regional partners. A board of directors appointed by the Governor oversees the activities of WFI and the delivery of workforce services. WFI is managed by a president and professional staff located in Tallahassee.

The workforce development system in Florida serves two primary customers – job seekers and employers seeking skilled workers. Workforce development services are provided to these customers primarily through the 24 regional workforce boards throughout the state which are chartered by WFI. There are within the State of Florida approximately 87 full-service One-Stop Centers that provide the gamut of workforce-related services to those individuals seeking jobs, those employed individuals needing skills upgrades to retain their jobs and to businesses seeking to fill vacancies or stay competitive by upgrading the skills of their existing workers. 'Workforce services' generally include work skills assessments, job training and job referrals. The One-Stop Centers also provide services to persons who present the challenge of being on welfare or transitioning off welfare to gainful employment. Assistance with meeting the financial and other support needs of low income families, services for the disabled, services for veterans and services for youth entering the workforce are also some of the other services provided through these One-Stop Centers within the 24 regions around the state.

In addition to the services provided directly through the One-Stop Centers at the local level, WFI manages several market-responsive talent development grant programs at the state level.

One such program--the Incumbent Worker Training program--provides federal funds to employers for training needed by their existing workers due to changing market conditions. Another program--the Quick Response Training program--provides state funds to employers who are creating high value jobs by locating to the state or expanding their current workforce and require customized training for its workforce. WFI also funds a number of demonstration projects at the state level tied to its six strategic goals. Demonstration projects are intended to fund innovative solutions to complex workforce issues and, again, these short-term projects generally target individuals in need of training and/or businesses and business sectors in need of trained workers.

Potential respondents are encouraged to visit the WFI web site at www.workforceflorida.com for more information about WFI and Florida's workforce system as well as the Employ Florida Marketplace at www.employflorida.com.

CONTRACTOR QUALIFICATIONS. Through this ITN, WFI intends to select and negotiate a contract with an individual or consulting organization within the following parameters:

1. **Organization Longevity and Location.** For a variety of reasons, the organization WFI selects must be located in the United States. To be considered, an organization must have been in business under its existing name and basically the same business structure for not less than one year from the date of issuance of this ITN.
2. **Experience.** WFI is interested in contracting with an organization that has significant experience in providing all phases for the preparation, development and launch of professional advisory relating to labor market information analysis, targeted industry clusters and demand occupations.
3. **Capacity.** WFI is interested in contracting with an organization that has significant in-house capacity and is able, as much as possible, to develop a robust inventory of technical assistance models and materials and deliver high quality and responsive technical assistance. WFI is not interested in contracting with an organization that is routinely required to utilize a number of outside contractors over which WFI has no control. That capacity will be demonstrated by listing the education and work experience of the organization's staff and describing in-house creative capabilities.
4. **Workforce / Economic Development Experience.** In addition to the general organization experience mentioned above, it will be a great advantage if an organization has some practical knowledge and experience working with a 'workforce' organization(s), preferably in Florida and/or any of the workforce partner organizations as well as the state's economic development organizations (state, regional and local). Many of the 24 regional workforce boards and economic development organizations have identified specific targeted sectors to prioritize within their geographic jurisdiction(s) based on various methodologies – that sort of experience would be invaluable. Certainly, if an organization has any state level workforce and economic development experience, that would also be extremely helpful.

5. Noteworthy Accomplishments & Awards. As a partial measure of the organization's quality of performance, it would be an advantage to WFI if the organization and/or individuals within the organization have been recognized for exemplary achievement.

SUBMISSION OF RESPONSES. Organizations interested in submitting a response to this Invitation to Negotiation must submit the following documents:

1. 'Organization Questionnaire' – Respondents will provide information regarding the organization that addresses the preferences listed above. This information will be provided in the format required in the attached document of the same title.
2. 'Examples of Work Product' – Respondents will provide examples of work product that they feel best illustrates the capabilities and talents of the organization and its individual members to meet the requirements of this solicitation. This work product may include copies of technical assistance strategies completed by the organization to what is being requested through this solicitation. The work product should be a product that was produced within the last three years. Each product that a respondent chooses to submit should reflect if any or all of the staff who developed the product are still with the organization. Respondents should exercise some discretion when it comes to providing work product. It is WFI's intent to conduct a personal presentation by one or more of the responding organizations and that would of course be an opportunity to provide more examples of work product.
3. 'Organization's Approach to ITN Request' – Respondents will provide a written outline and project summary on how they intend to approach the task as outlined in the ITN. Key work product deliverables, timelines, and engagement of collaborative partners should be noted with full explanations and justifications to affect the highest outcomes envisioned by WFI.

Six copies of the 'Organization Questionnaire' and any examples of work product the respondent may wish to provide must be submitted to the address below not later than **5:00 PM, Eastern, Monday, February 20, 2012:**

Workforce Florida, Inc.
1580 Waldo Palmer Lane
Suite 1
Tallahassee, FL 32308
ATTN: Jayne Burgess

SELECTION. Potential respondents are reminded that this is not a bid nor a Request for Proposals and, therefore, WFI is not seeking actual proposals, pricing plans or contract offers. This Invitation to Negotiate merely seeks to identify organizations that are interested in establishing a contract with WFI to provide professional advisory and technical assistance services to review the history, usage and analysis of the current Targeted Occupations List processes assessing the quality and capabilities of such potential contractors. WFI will review the responses and evaluate proposals based on what WFI deems to be the most suitable and qualified. WFI retains the sole authority for developing and applying the criteria it will use to evaluate proposals.

WFI may choose to request that one or more of the responding organizations make a face-to-face presentation to an individual or individuals reviewing responses. If needed, every effort will be made to schedule the presentation(s) at a time and on a date satisfactory to the respondent. Presentations, if necessary, will be scheduled in Tallahassee, probably at WFI headquarters on Waldo Palmer Lane. WFI, at its sole discretion, may determine that a personal presentation(s) is not necessary. Tentatively, WFI plans to schedule presentations, if necessary, the week of **March 5, 2012**.

NOTE: When WFI has made its decision regarding which organization it deems to be the most suitable and qualified for this project, it will notify all respondents of that decision. WFI will then set up a meeting with the organization it selects and commence negotiations relative to specific 1) scope of services, 2) timetables for implementation and 3) costs. If negotiations are unsuccessful, WFI retains the right to initiate contract negotiations with the next highest ranked organization or the first considered most suitable and continue that process until it successfully negotiates a contract. WFI retains the sole authority to make its selection based on what it determines to be its best interest. WFI, at its sole discretion, may reject any and all responses as not meeting the needs of this project. **WFI anticipates that a selection decision will be made sometime during the week of March 19, 2012.**

CONTRACT. The contract resulting from this ITN will be a two-party contract between WFI and the organization that is selected. Any subcontractors the organization may use from time to time during the course of the contract will not be a party to the organization's contract with WFI. The contract will establish pricing to be utilized for various aspects of the service. It is anticipated that the resulting contract will be for a minimum of one year but the actual length of the contract and any possible renewal options will be terms to be negotiated by the parties.

CONTACT. Organizations should direct inquiries regarding this ITN to Jayne Burgess, Program Director, Workforce Florida, Inc., via email at the following address –

jburgess@workforceflorida.com

No phone calls please.

Workforce Florida, Inc.

**Invitation to Negotiate
for
Occupational Training Program Governance Study**

ORGANIZATION QUESTIONNAIRE

Please provide the information requested in this questionnaire and submit six (6) copies of the questionnaire responses along with samples of work product to Workforce Florida, 1580 Waldo Palmer Lane, Tallahassee 32308, ATTN: Jayne Burgess. Please follow this format for preparing the response to this ITN. Responses must be received by Workforce Florida on or before 5:00 PM, Eastern, **Monday, February 20, 2012**: Questions may be directed to Jayne Burgess via email at jburgess@workforceflorida.com.

1. Name of Organization (FEID #):	
2. Address:	
3. Contact Information:	
a) Contact Name & Title:	
b) Contact Phone #	
c) Contact Fax #	
d) Contact email address	
4. No. Years in Business Under Above Name	/yrs

<p>5. Experience – List any current or recent (within the last 3 years) projects that demonstrate the organization’s experience in successfully executing research relating to this solicitation. Organizations may list as many projects as they wish but each project that is included should provide information to WFI about the scope and quality of services offered by the organization. Work product from these contracts may be included. For <u>each</u> project list –</p> <ul style="list-style-type: none">a) The organization with which the organization contracted;b) The length of the contract;c) The organization’s current staff that were/are involved in the contract;d) A description of the professional services that are/were provided by the organization including the methodology followed; the tasks, timeline and deliverables executed; and the budget parameters;e) Describe whether this project was done totally in-house, primarily in-house or primarily by outside sources; andf) Any anecdotal information regarding the success of the program and how the information was used.
<p>6. Capacity – Describe the organization’s capacity to launch, implement and manage the research study. If applicable, describe the organization’s ability to negotiate cost-sharing opportunities with key vendors. This will include a list of the organization’s staff to include each person’s educational background and work experience. The person who will be designated the lead for the WFI project should be identified. The section on <i>capacity</i> should also list any equipment or other resources the</p>

organization has that will help WFI determine the organization's ability to conduct a multi-faceted, statewide initiative.

7. Workforce / Economic Development Experience – List any experience the organization has had providing services to a 'workforce' or economic development organization, and any of the partner organizations noted in the '*Purpose*' section. This experience may be in a prime contractor role or as a subcontractor. Identify the name of the organization for which services were provided and the type of services provided. These can be projects that are listed in 5. Experience, above.

8. Noteworthy Accomplishments & Awards – List and provide a brief description of any awards the organization or individual staff members have received during the last three years. List the entity that made the award.

9. Work Product – Provide samples of work product. Respondents will also be asked to provide work product at the face-to-face presentation if one is scheduled. This request for work product to be submitted with the ITN response is intended to give WFI some idea of the quality of the products developed by the organization. Respondents should identify if they developed the product or whether it was developed in conjunction with a third party – **WFI's preference is that respondents only include work product they have developed.**

10. Organization's Approach to ITN Request – Provide a detailed written outline along with cost estimates and project summary on how the organization intends to approach the task as outlined in the ITN. Key work product deliverables, timelines, and engagement of collaborative partners should be noted with full explanations and justifications to affect the highest outcomes envisioned by WFI.

It is WFI's desire to keep responses to a 'manageable' size but respondents may provide any other information, not specifically addressed here, they feel will give WFI an idea of the organization's capability and the quality of its services.