



## **Request for Quotes:**

### **Strategic Plan Development**

**Proposals Due: 11:59 PM EDT**

**June 27, 2022**

**Partner4Work  
650 Smithfield Street, Suite 2400  
Pittsburgh, PA 15222**

**Date Released:**

**May 27, 2022**

**Partner4Work (TRWIB, Inc.) is an equal opportunity employer.**

**Auxiliary aids and services are available upon request to persons with disabilities.**  
Any agreements resulting from this RFQ will be funded 100% through Management & General Funds and covered by Federal Funding and Non-Federal Funding via Partner4Work as the grant recipient.

## Who We Are

TRWIB, Inc. (dba “Partner4Work”) is the workforce development organization that connects funding, expertise, and opportunities to develop a thriving workforce in Pittsburgh and Allegheny County. With a budget of more than \$25 million in public and private workforce funds, Partner4Work (hereafter “P4W”) delivers a comprehensive portfolio of programs and initiatives for adults and youth to ensure that current and future needs of employers, job seekers, and underemployed workers are met.

## Purpose of this RFQ

Partner4Work is seeking a qualified organization, firm, and/or individual to develop and lead a strategic planning process to help our organization create a robust, comprehensive five-year strategic plan. The qualified organization, firm, and/or individual should plan to research the current functions and operations of the organization, conduct interviews with leaders and stakeholders, plan sessions to gather information from P4W Board members, stakeholders, and partners, and draft a five-year strategic plan that will guide the Board of Directors and Staff in decision-making and operations.

## Scope of Work

The awarded organization, firm, and/or individuals will be expected to facilitate a strategic planning process that will provide guidance on the future decision-making and continuous improvement of the organization. The goal of this process is to emerge with a clear strategic plan for the next five years, which will help the organization meet its federal and state requirements, guide the organization’s work in other areas such as supporting the growth of industry partnerships, strengthening equity in employment, changing private and public sector policy and practices, developing strategic partnerships, and vetting new opportunities.

The awardee will have an understanding of the process needed to infuse DEI into a strategic plan and will be expected to work closely with the CEO and/or the CEO’s designees to plan and lead the strategic planning process for Partner4Work. This will include providing professional analysis, guidance, and recommendations including, but not limited to the following:

- A. Designing the strategic planning process, taking into consideration input and direction from the CEO and/or the CEO’s designees.
- B. Identifying Partner4Work’s core organizational mission, vision, values, past successes, competitive advantages, opportunities, weaknesses, and threats, at least in part by obtaining input from major stakeholders and appropriate staff.
- C. Completing a scan of the landscape in which Partner4Work operates, including political and policy environments, federal and state requirements for local workforce development boards, national best practices and trends in workforce development, and local realities.
- D. Planning and facilitating 4-5 meetings of key stakeholders, including Board members, staff, partners, and policymakers. The meetings shall be conducted in a way to gather information from a diverse population. It is expected that the meetings will have engagement and ownership by the Board and stakeholders and the facilitation by the vendor shall aid in that goal.
- E. Develop Strategic Plan products and deliver related reports.

## Process and Deliverables

The Consultant will be accountable to the Partner4Work Executive Committee via its CEO or the CEO's designee and will provide bi-weekly updates in writing and meet with the CEO and/or the CEO's designee(s) as necessary throughout the engagement.

Deliverables will include the following components:

- Design and lead Partner4Work through a process to identify and clearly describe organizational goals and desired state in 2027.
- A five-year strategic plan, resulting from drafts required to obtain approval by the CEO and/or the CEO's designee(s) and the Executive Committee of Partner4Work's Board of Directors.
- Supporting documents that identify goals, measurable objectives, and desired outcomes for Partner4Work and its ecosystem (such as civic leaders, employers, labor, philanthropy, education, government, economic development, and human services). Desired outcomes may include population-level outcomes such as racial equity outcomes, changes in public and private sector policies and practices, outcomes for strategic partnerships, organizational outcomes, and other outcomes focused on Pittsburgh and Allegheny County.

## Potential Sources to Draw From

- [Partner4Work's 2017-2019 Strategic Plan Dashboard](#) and close-up information for each strategic goal
- [The Local Workforce Development Plan for Allegheny County and the City of Pittsburgh and the Regional Workforce Development Plan for 2021-2025](#)
- [The Intermediate Strategic Plan \(2018-2020\)](#)

## How to Apply

Interested consultants shall submit their quotes in the format as specified below by June 27, 2022 at 11:59 pm EDT to [rfp@partner4work.org](mailto:rfp@partner4work.org). Lengthy narrative is discouraged; presentations should be brief and concise and not include extraneous or unnecessarily elaborate promotional material. The proposal should be in a .pdf format (zipped if necessary) not exceeding 10 pages in length.

**1. Cover Sheet**-See Exhibit A.

**2. Executive Summary** (2-page maximum) - Name of individual(s)/agency - Primary Contact information (name, address, phone number, email address, website) - Individual(s)/agency history including years in business, names, and resumes of the key personnel - Two (2) client references. Indicate the name and position of the person who will be performing the consulting services as specified in this Request for Quote. Provide a brief resume of the individual(s) background, training, and experience.

**3. Project description** (3-page maximum) that describes the strategy to accomplish the objectives outlined above and the methodology for tracking and meeting project deadlines

**4. Fee for Services** (any out-of-pocket expenses proposer expects to incur should be detailed) - Specific services delivered should be required and expected invoicing schedule.

**5. Timeline** Detailed timeline of activities required to complete the scope of work. Partner4Work expects deliverables within 12 weeks of contract award and execution.

## Budget

Bidder will provide a clear and reasonable budget for all services outlined above, reflective of an effective strategic planning process and deliverables. No additional money will be provided for contractor's travel, material, or technology costs not provided in the proposed budget.

## Review and Selection Process

P4W will convene a committee to review and score proposals according to the required content described in this RFQ with attention to clarity, completeness, and quality.

The maximum points any proposal can receive are 100 based on the following criteria:

1. Organizational expertise: The applicant demonstrates the capacity and experience to deliver the required deliverables. Maximum: 35 points.
2. Approach: Organization understands and describes a proper approach to obtain the required information and create the needed reports in a timely manner: 35 points
3. Fee: The applicant provides detailed cost information to support the reasonableness of the project. Maximum: 30 points

Interviews: Based on the scoring and proposals received, Partner4Work will invite the top scoring proposers to a 45-minute interview with the CEO, his designees, and/or members of the Executive Committee of the Board of Directors.

## Review Timeline

Release of RFQ	May 27, 2022
Letters of Intent to Partner4Work	June 10, 2022
Questions due to P4W	June 17, 2022
Final answers given	June 21, 2022
Quotes due	11:59 PM EDT June 27, 2022
Interview with finalists	July 5-July 8, 2022
Selection of awardee	July 11, 2022

## Questions

Questions or requests for additional information must be made in writing to [rfp@partner4work.org](mailto:rfp@partner4work.org). Answers will be posted at [www.partner4work.org](http://www.partner4work.org) to make them available to the public to ensure a fair and transparent process.

## Disclaimers

- [Executive Order 2021-06, Worker Protection and Investment](#) must be followed throughout this RFQ.
- This Request for Proposals (RFQ) does not commit Partner4Work to award a contract.
- Partner4Work may select a firm based on its initial proposal received, without discussion of the proposal. Accordingly, each proposal should be submitted on the most favorable terms, from a price and technical standpoint, that the bidder can submit to Partner4Work. Partner4Work may, however, have discussions with those firms it deems in its discretion to fall within a competitive range.
- Partner4Work reserves the right to request additional information from any applicant, request oral presentations from applicants, or conduct site visits from any applicant before a contract award.
- Partner4Work reserves the right to fund portions of a proposal, or to reject any and all proposals in whole or in part. Rejection of a portion of a proposal does not necessarily negate the entire proposal.
- Partner4Work may, at its discretion, adjust the level of funding provided to successful bidders under this RFQ and/or consider the funding of proposals not initially funded under this RFQ at a later date.
- No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to Partner4Work and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
- The contract award will not be final until Partner4Work and the successful bidder have executed a mutually satisfactory contractual agreement. Partner4Work reserves the right to make an award without further discussion of the proposal submitted. No activity may begin prior to final Partner4Work approval of the award and execution of a contractual agreement between the successful bidder and Partner4Work.
- The submission of the proposal warrants that the costs quoted for services in response to the RFQ are not in excess of those that would be charged to any other individual for the same services performed by the bidder.
- Applicants are advised that most documents in the possession of Partner4Work are considered public records and subject to disclosure. Partner4Work reserves the right to issue additional RFQs if and when it is in Partner4Work's best interest to do so and may elect to negotiate and issue multi-year contracts to successful bidders under this or subsequent RFQs.
- All programs and activities are designated as equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Contact staff to request assistance with access to this RFQ.
- Applicants must be capable of agreeing to the requirements set forth in the Partner4Work contract templates, available at <https://www.partner4work.org/document/partner4work-contract-templates/>.

**APPENDIX A**  
**Request for Quotes Cover Sheet**

**Lead Applicant:** Click or tap here to enter text.

**A. Contact Information**

Organization Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

City: Click or tap here to enter text. State: Click or tap here to enter text. Zip Code: Click or tap here to enter text.

Principal Contact Person: Click or tap here to enter text. Title: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

Fiscal Contact Person: Click or tap here to enter text. Title: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

Executive Director: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

**B. Legal Information**

Type of organization: For-profit:  Non-Profit:  Government:  Education Institution   
Federal Employer Identification Number (FEIN): Click or tap here to enter text.

Please provide your current [Unique Entity ID](#) : \_\_\_\_\_

Please provide your current [CAGE Code](#): \_\_\_\_\_

**C. Requirements / Documents** *(proposals submitted without these documents will be considered incomplete, please see associated links for more information and instructions as to how to acquire them) Please note that a single copy of all requirements below must be submitted for EACH Partner, in addition to the lead applicant.*

- Registration in the [System for Award Management](#) (SAM)
- Certificate of Liability Insurance; Including Cyber Security Coverage
- Most recent financial audit *(if applicable)*
- Certificate of Worker's Compensation Insurance *(if applicable)*
- W9

**D. Additional Requirements**

- Agree to Use Partner4Work's Contract Management Software, Parley Pro, for Contract Negotiation
- By submitting your proposal you certify that you are compliant with the following [PA state integrity policy](#). If you are not, please submit along with your proposal a written explanation of why such certification cannot be made