

REQUEST FOR QUALIFICATIONS

WESTMARC (Western Maricopa Coalition)

FY 2017 WORKFORCE IMPLEMENTATION STRATEGY



WESTMARC

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PUBLIC NOTICE

REQUEST FOR QUALIFICATIONS

FY 2017 Workforce Implementation Strategy

The Western Maricopa Coalition (WESTMARC) is requesting qualifications from qualified consultants for the FY 2017 Workforce Implementation Strategy. The purpose of the project is review qualitative and quantitative data related to the available workforce in the West Valley; finalize the Strengths, Weakness, Opportunity, and Threat (SWOT) analysis, and develop implementation strategies to enhance the advanced industry workforce in the West Valley.

Detailed qualifications requirements may be obtained by contacting the WESTMARC Office at the address indicated below or may be downloaded from www.westmarc.org. A pre-quote conference and Q&A session will be held on January 23, 2017, 9:00am at the WESTMARC office. Meeting participants may also call into the meeting by dialing 1.800.466.8543 PIN: 214617. For further information, please submit questions in writing by email to shoffman@WESTMARC.org not later than January 23, 2017. Any addenda responding to questions will be posted on WESTMARC's website at www.westmarc.org not later than January 25, 2016.

Qualifications will be accepted until February 10, 2017, 12:00 p.m. MST (Mountain Standard Time) at the WESTMARC office, 6751 N. Sunset Blvd., Suite 210, Glendale, AZ 85305.

SCOPE OF SERVICES

Introduction

The purpose of this Request for Qualifications (RFQ) is to solicit qualifications from qualified consultants, either one or many, depending on the expertise as related to the task, for Workforce Implementation Strategy. The purpose of the project is review qualitative and quantitative data related to the available workforce in the West Valley; finalize the Strengths, Weakness, Opportunity, and Threat (SWOT) analysis assessment, and develop implementation strategies to enhance the advanced industry workforce in the West Valley. The West Valley is defined as communities in the Phoenix Metro area west of the I-17 in Maricopa County.

Background

Workforce is one of the most important elements in growing a stronger economy in the West Valley. Every day, communities west of the I-17 export talent throughout the region. The leadership in the West Valley is working to attract additional advanced industries. To be successful, the West Valley needs to validate the talent that resides in the West Valley and mitigate any gaps with actionable implementation strategies.

To this end, WESTMARC has been partnering closely with West Valley communities, the Maricopa Association of Governments (MAG), and the Greater Phoenix Economic Council (GPEC). Throughout the past year, these partners have collected and analyzed workforce data; conducted outreach with leaders in industry and education; created an initial Strengths, Weakness, Opportunities, and Threats (SWOT) analysis; and developed an analytical tool to advance this work. A consultant is sought to analyze the data, finalize the SWOT, and support the West Valley in developing implementation strategies that will strengthen the workforce.

Data has been analyzed to show varying concentrations of West Valley workers in the following desired sectors:

- Advanced Business Service
- Finance, Insurance, Real & Estate
- Healthcare
- High Tech
- Metal Inputs & Transportation
- Non-Metallic Manufacturing
- Telecommunication
- Transportation

The consultant will provide relevant information about best in class examples to assist in the development of a talent management pipeline. These best in class examples will be used to further refine the implementation strategy. This process will help us build consensus and support for viable workforce development strategies that can be implemented in the West Valley.

PROPOSED TASKS

The Proposer is encouraged to be creative in developing a sound analytical approach which achieves the goals for this project. The Proposer is urged to be as specific as possible when describing the activities that will be performed to support each task. The Proposer is also urged to make maximum use of matrices, tables and drawings in working papers produced for the project to ensure conciseness and clarity and to

minimize the amount of text required. In preparing qualifications for consideration by WESTMARC, the Proposer may suggest additional tasks as warranted. The Proposer is not limited to the the specific tasks listed below. These tasks may be accomplished by one or more consultant or agency, depending on the expertise needed to accomplish the task.

Task 1. Data Analysis

The CONSULTANT will review the data collected by the Project Management Team to date. This includes quantitative and qualitative data (i.e. commute shed and TRP data that indicate which employees are leaving the West Valley for work) collected from industry and education forums, site selector interviews, demographic data, occupational and residential data compiled by the Maricopa Association of Governments (MAG), and the initial stakeholder SWOT. Identify and assist with closing any existing data gaps that may reasonably be addressed and that are critical to the project.

Task 2. Stakeholder Engagement

The CONSULTANT will convene stakeholders through interviews, focus groups, and working group meetings as needed. Stakeholders may include economic development representatives from communities west of the I-17, educators, the Greater Phoenix Economic Council, and MAG. The CONSULTANT will leverage the expertise of the stakeholders and use their feedback to identify priorities for the project.

Task 3. SWOT Validation

The CONSULTANT will review and validate the initial stakeholder SWOT developed by the Project Management Team. This review will include determining the skills gaps for the targeted industries; the amount of surge labor of college-age students, retirees, and stay at home parents; and a review of the current training and educational programs to mitigate the skill gap. The data needed to be reviewed will be provided by the Project Management Team. The CONSULTANT will review and finalize the short, medium, and long term goals based on the data. The goals will address industry leadership expert groups, retraining the adult population, preparing the upcoming workforce through career technical education, and Bachelors and Masters programs to support targeted advanced industries.

Task 4. Literature Review

The CONSULTANT will identify relevant best in class examples of talent management that may be viable to implement in the West Valley. The CONSULTANT will nuance these examples to fit within the capacity and priorities of the West Valley.

Task 5. Workforce Implementation Strategy Development

The CONSULTANT will develop a multi-year implementation strategy for the West Valley. The strategy should describe activities and organize them into initiatives designed to accomplish goals and objectives from the SWOT. The action plan will recommend responsibilities, resources, and priorities for implementation. The CONSULTANT will develop estimated operating costs and capital costs, timeframes, and financing strategies.

Task 6: Evaluation and Reporting

The CONSULTANT will determine what performance measures are appropriate and establish a method for collecting them throughout the period of the strategy. This will include a process for maintaining public communication and progress made, as well as a plan for updating the strategy in five years.

Deliverable Products:

Required products of this project are listed below. An administrative draft of each deliverable will be submitted in electronic form and, when requested, hard copy format, to the WESTMARC project manager for review. Comments from the WESTMARC project manager will be incorporated into the deliverable by the CONSULTANT, before it is distributed for external review. Comments received during the external review process will be incorporated into the final drafts.

1. Data Analysis Report. This will include a list of all documents reviewed, the findings of the review and of the analysis, as well as additional data to address gaps in the data as negotiated by WESTMARC and the CONSULTANT.
2. Stakeholder Engagement Report. This will include attendance, agendas and minutes notes from meetings held with stakeholders, as well as findings from the meetings.
3. Finalized SWOT. This will include a summary of the West Valley workforce strengths, weaknesses, opportunities and threats in the West Valley; as well as goals for enhancing the advanced industry of workforce in the West Valley. Supporting data will be included in the report.
4. Project Coordination. This includes bi-monthly calls between the WESTMARC team and the CONSULTANT to provide an update on progress made and to identify midcourse adjustments.
5. Workforce Implementation Strategy. This includes a detailed strategy to enhance the workforce in the West Valley, especially regarding advanced industry. The CONSULTANT will provide a timeline for execution and a corresponding budget for said strategy.
6. Final Report. This will include a final West Valley Workforce Implementation Strategy with a detailed executive summary in Microsoft Word. It will also include a final PowerPoint to be used in public presentations with key stakeholders, the general public, and elected officials.

QUALIFICATIONS REQUIREMENTS AND CONTENT

Qualifications Content

It is required that the qualifications include the following items in the same order as they are listed below. Brief and concise submittals are encouraged. The total number of pages must not exceed 20 pages, entirely on letter size (8.5 x 11 inches), excluding the resumes, the cover letter, table of contents, tabs, appendices, and forms. Blank pages are not included in the total page count. The outside packaging of the submittal must be clearly marked with the Project Title, the RFQ Due Date, and the Proposer's name.

1. **Identification.** A cover letter or equivalent which includes:
 - a. The title of this solicitation.
 - b. Proposer's name and business address.
 - c. The name, title, mailing address, and telephone number and email address of the principal contact.
2. **Table of Contents.**
3. **Organization and Approach.** A brief statement describing the Proposer's organization and outlining its approach to completing the work required by this solicitation. This statement shall briefly illustrate the Proposer's overall understanding of the project.
4. **Work Plan.** A concise explanation of how the Proposer will carry out the objectives of the project. In the work plan, the Proposer shall describe each project task and proposed approach to the task as clearly and thoroughly as possible.
5. **Preliminary Schedule.** A project schedule in bar-chart format will indicate all work plan tasks and their durations. The schedule shall clearly identify project deliverable dates.
6. **Staffing Plan.** The plan shall include the following in table format:
 - a. A project organization chart, identifying the project manager.
 - b. Names of key project team members and/or Sub consultants. Only those personnel who will be working directly on the project should be cited.
 - c. The role and responsibility of each team member.
 - d. Percent effort (time) of each team member for the contract period.
 - e. The role and level of WESTMARC technical staff support, if any.
7. **Résumés.** Include résumés for major staff members assigned to the project. These résumés should focus on their experience in this type of project.
8. **Budget.** A completed labor cost allocation budget formatted as noted in Appendix A.
9. **Recent Examples.** Proposer's recent experience in performing work similar to that anticipated herein. This description shall include the following:

- a. Date of the project.
- b. Name and address of client organization.
- c. Name and telephone number of the individual in the client organization that had management responsibility for the project.
- d. Brief description of the project.
- e. Proposer team members involved and their roles.

PROPOSER'S CHECKLIST

Before submitting a qualification, please make sure all required information as specified in "Qualifications Requirement" have been included.

1. Six hard copies of the qualifications with a maximum of 20 pages.
2. Email submission of all application materials to shoffman@WESTMARC.org. Email submission is in addition to hard copy submission.
3. Description of Proposer's organization and approach to work required by the solicitation.
4. Work plan including preliminary schedule, staffing plan, résumés, and similar experience.
5. Labor cost allocation budget.
6. Qualifications submitted not later than by 12:00 p.m. MST.

QUALIFICATIONS DELIVERY AND OPENING

1. Six copies of the qualifications must be submitted by February 10, 2017, 12:00 p.m. Mountain Standard Time (MST), to the following address:

WESTMARC
Attention: Sintra Hoffman
6751 N. Sunset Blvd., Suite 210
Glendale, AZ 85305

Timely receipt of qualifications shall be determined by the date and time the qualifications is received at the above address. No late submissions, facsimile, or electronic submissions shall be accepted after the time indicated. Hand delivery is therefore encouraged to assure timely receipt. Qualifications received after the deadline shall be stamped for time and date and returned unopened to the Proposer. All material submitted in response to this solicitation becomes the property of WESTMARC and shall not be returned.

QUALIFICATIONS EVALUATION AND SELECTION PROCESS

1. **Evaluation Criteria.** All QUALIFICATIONS will be evaluated by a group consisting of WESTMARC staff and stakeholders. Evaluation criteria include the following, listed in rank of importance:
 - Demonstrated understanding of the project through a well-defined work plan consistent with program objectives.
 - Clarity of qualifications, realistic approach, technical soundness, and enhancements to elements outlined in this RFQ.
 - Education and relevant experience of personnel in providing similar services. Only those personnel assigned to work directly on each area should be cited.
 - Proven track record in this area of study. Proposer should clearly identify the principal people who worked on past projects and the amount of time they devoted to the work effort.
 - Availability of key personnel throughout the project effort.
 - Price.
 - Ability and commitment to deliver required products and services, meet all deadlines for submitting associated work products, and ensure quality control.
 - Recognition of work priorities and flexibility to deal with change and contingencies.
2. WESTMARC may conduct discussions with Proposers who submit qualifications determined likely to be selected for the award.
3. WESTMARC reserves the right to:
 - a. Cancel this solicitation.
 - b. Reject any and all qualifications and re-advertise.
 - c. Select the qualifications(s) that will, in its judgment, best meet WESTMARC 's needs, despite any differences in estimated project costs between the proposer and all others.
 - d. Negotiate a contract that covers selected parts of a qualifications, or a contract that will be interrupted for a period, or canceled, for lack of funds.
4. Contact with WESTMARC or WESTMARC Member Agency Employees. All firms interested in this RFQ (including the firm's employees, representatives, agents, lobbyists, attorneys, and sub consultants) will refrain, under penalty of disqualification, from direct or indirect contact for the purpose of influencing the selection or creating bias in the selection process with any person who may play a part in the selection process. This policy is intended to create a level playing field for all potential firms, and to protect the integrity of the selection process. All questions on this selection process should be addressed to the authorized representative at WESTMARC.
5. **WESTMARC Approval.** A recommendation for approval of the consultant selection shall be made by the WESTMARC Executive Director to the WESTMARC Board of Directors. The decision of the Board of Directors is final.

