



A. Objective

The Tulsa Area Workforce Development Board (dba Workforce Tulsa) seeks an experienced consultant to design and facilitate a participatory planning process that will result in the creation of a five-year strategic plan for our organization. The consultant may also guide some aspects of the implementation of the plan.

B. Deadline for receipt:

Proposals must be received via email by 5:00 pm (CST) on March 12, 2018. Proposals should be addressed to Shelley Cadamy, Executive Director, and emailed to scadamy@workforcetulsa.com.

C. Inquiries

- a. Inquiries must be made via email. Please address all inquiries to: scadamy@workforcetulsa.com. Telephone inquiries will not be addressed. All questions must be received no later than 5:00 pm (CST) on March 5, 2018.

D. Background

- a. Workforce Tulsa is an economic development non-profit that connects job ready talent with Tulsa area companies through public-private partnerships. Workforce Tulsa is guided by a 45-member board, made up of leaders from private industry, economic development, community based organizations, organized labor, and education.
- b. Workforce Tulsa is currently funded solely from federal funds which are received via the Workforce Innovation and Opportunity Act. We are seeking to increase our funding and our programming to better meet the needs of the Tulsa area.
- c. Workforce Tulsa currently serves companies in Tulsa, Osage, Pawnee, and Creek counties. We are a 501(c)3 that was established in 1992.
- d. Workforce Tulsa has four staff members, including an Executive Director and one contracted service provider with approximately 17 employees. Workforce Tulsa manages two American Job Centers. Both are comprehensive centers and are located in downtown Tulsa and in Sapulpa.

E. Scope of Work

- a. The selected facilitator will design and execute a process by which the board will
 - i. Become more engaged with each other and with Workforce Tulsa's mission.
 - ii. Better leverage their own industry expertise and influence to help meet Workforce Tulsa's mission;
 - iii. Share a common vocabulary;
 - iv. Create intentional, high level goals to drive workforce development strategy for the next five years;
 - v. Provide "next steps" for how the tactical pieces of the plan will be created and implemented by staff and the service provider;
- b. The process should include at least one facilitated session with the board and staff but may include any other components that the facilitator deems effective, including gathering community input.
- c. Deliver an electronic "strategic plan" that will grow with the organization.
- d. Be willing and available to conduct up to three follow-up meetings with the Board and/or Staff to discuss progress toward meet established goals.

F. Proposal Content Requirements

- a. A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, and email of principal contact person.
- b. Executive summary of the highlights of the proposal, not to exceed one page in length, and conveying the consultant's understanding of the purpose and expected outcomes of the project.
- c. A list of key personnel who would be involved in the process and their expertise/experience. If you plan to contract with a third-party vendor please identify what firm you plan to use.
- d. A summary of the consulting firm's qualifications and relevant experience, including knowledge of workforce development and economic development.
- e. A work plan that includes a description of the methodology, tasks, timeline and estimated total amount of time that would be spent on the project. Responses that fail to include a timeline will not be considered.
- f. A schedule of costs that includes consulting, supplies, number of onsite visits and cost

per trip, and other costs associated with the planning process.

- g. References and contact information for three organizations for which the facilitator has provided strategic planning services.

G. RFP Standards and Selection Criteria

- a. The proposal will be evaluated by Workforce Tulsa and will include the following criteria:
 - i. Responsiveness of the written proposal to the purpose and scope of the project.
 - ii. Demonstrated knowledge, skills, and experience in conducting strategic planning projects.
 - iii. Methodology and timeline for carrying out tasks in the scope of work.
 - iv. Cost to complete the process.
 - v. Ability to meet deadlines and operate within budget.
 - vi. Positive experience and success in strategic planning; satisfactory performance record (references).

H. RFP and Tentative Planning Process Timeline

- a. Proposals must be received via email before 5:00 pm on (CST) March 12, 2018.
- b. All questions must be received no later than 5:00 pm (CST) on March 5, 2018.
- c. Consulting firm selected at Workforce Tulsa's board meeting on April 19, 2018.
- d. Strategic planning process begins on a date agreed upon by the successful bidder and the Workforce Tulsa Executive Director.
- e. A draft report/plan and executive summary are to be submitted to the Board Chair & Executive Director three weeks in advance of the final deliverable due date.
- f. Final deliverable to be presented in person at a Workforce Tulsa board meeting to be determined by the successful bidder and the Workforce Tulsa Executive Director.