

SECTION I REQUEST FOR QUOTATION (RFQ)	
<b>RFQ TITLE: Facilitator – Strategic Planning Workshop - for SFWIB Board</b>	
<b>RFQ ISSUE DATE: 9-12-2025</b>	<b>BID/PROPOSAL DUE DATE: 9-28-2025</b>
<b>PROGRAM YEAR: PY 2025 / 2026</b>	<b>ATTACHMENTS: Yes</b>

SECTION II SFWIB CONTACT INFORMATION	
<b>SFWIB PURCHASING AGENT:</b>	<b>Rebecka Richardson</b>
<b>CONTACT INFO:</b>  Office: 305-929-1515 Fax: 305-477-0113	<b>ADDRESS:</b>  7300 Corporate Center Drive, Suite 500 Miami, FL 33126
<b>E-MAIL ADDRESS:</b>	<b>Rebecka.richardson2@careersourcesfl.com</b>

SECTION III VENDOR INFORMATION	
<b>BUSINESS REPRESENTATIVE:</b>	
<b>CONTACT INFO:</b>  Office:	<b>ADDRESS:</b>
<b>E-MAIL ADDRESS:</b>	

SECTION IV SUBMISSION REQUIREMENTS
1. Descriptive Narrative on business letterhead to include indicated items and examples on Attachment 2, Vendor Data Form and Questionnaire.
2. Original W-9 Request For Taxpayer Identification Number And Certification (Rev. March 2024)
3. Quotes must be clearly written, explained and submitted on company's letterhead.
4. Respondents must submit responses to the person indicated in section II of this RFQ
5. Responses must be received by the due date stipulated in section I of this RFQ
6. Vendors must (a) agree to accept the SFWIB's Indemnification clause, (b) adhere to the Terms and Conditions of the SFWIB Purchase Order located at <a href="http://www.careersourcesfl.com/wp-content/uploads/SFWIB-Purchase-Order-Terms-and-Conditions-(Revised%2011-17-21).pdf">http://www.careersourcesfl.com/wp-content/uploads/SFWIB-Purchase-Order-Terms-and-Conditions-(Revised%2011-17-21).pdf</a> ( <a href="http://www.careersourcesfl.com">careersourcesfl.com</a> ), and (c) submit all required documentation and information.

## A. South Florida Workforce Investment Board (SFWIB) Background

The South Florida Workforce Investment Board d/b/a CareerSource South Florida (SFWIB, CareerSource, or Board), Local Workforce Development Board (LWDB) Local Workforce Development Area (LWDA) 23 (Miami-Dade County), is one of 24 LWDBs in the State of Florida. Through its network of CareerSource centers located across Miami-Dade County, the SFWIB serves businesses, job seekers, adults, youth, dislocated workers, refugees and individuals transitioning from welfare to work.

The SFWIB is a governmental agency and instrumentality of Miami-Dade County, eligible to exclude income under Section 115 of the U.S. Internal Revenue Code. The Board is composed of volunteers who represent local private sector businesses, educational institutions, economic development agencies, labor organizations, veterans' interests, community-based organizations, and state and local government agencies. The Board conducts its business in accordance with federal and state laws, the Interlocal Agreement that created the SFWIB for LWDA 23 of the State of Florida, and the SFWIB's by-laws and approved policies.

Additional information regarding the Board, its members, and approved policies is located at [www.careersourcesfl.com](http://www.careersourcesfl.com).

## B. Definitions

**Cone of Silence:** All Respondents to this RFQ are subject to the "Cone of Silence," which applies to solicitations and prohibits ex parte communications. Specifically, the "Cone of Silence" prohibits communications regarding this solicitation between a current or potential respondent and any SFWIB member, SFWIB staff person, or any other person serving as a selection committee member during this solicitation process. Pursuant to applicable law, **communications between a vendor or potential vendor and SFWIB staff is limited and subject to certain documentation requirements.** Respondents directly contacting Board members, staff, or selection committee members risk immediate elimination of their proposals. **The "Cone of Silence" will be in effect upon release of this RFQ.**

Bidder and Respondent are interchangeable terms and mean any company, business, firm, agency, etc., that submits a proposal in writing to the SFWIB in response to this RFQ.

## C. Method of Solicitation

Through a competitive procurement process, the SFWIB performs purchasing activities for the acquisition and provision of goods and services from vendors and suppliers. This is an invitation for companies to submit responses to this solicitation. The issuance of this solicitation does not commit the SFWIB to pay any costs incurred by the Bidder in preparation or response to this RFQ.

This is not an offer and companies are not under any obligation to respond to this solicitation. Failure to respond to this solicitation within the timeframe specified, or modifications, changes, or revisions to this solicitation may be considered non-responsive.

## D. Services Solicited Under this RFQ –

The services are specified in **Attachment 1, which is attached hereto and incorporated herein by reference.**

## E. Specifications

The SFWIB invites vendors to respond to this RFQ.

Vendors must be fully registered and in Active status with Miami-Dade County and/or State of Florida, and registered with the Florida Department of State ([www.sunbiz.org](http://www.sunbiz.org)) prior to the award of any agreement or Purchase Order.

Vendors willing to do business with the SFWIB will be required to submit an original Form W-9, Request for Taxpayer Identification Number, and Certification.

Vendors must agree to accept the SFWIB's Indemnification clause and other requirements specified in this solicitation, Scope of Work, addendums, or other attachments, or Professional Services Agreement (PSA) or contract, or the SFWIB Purchase Order Terms and Conditions which includes the following:

### FAR Deviation Clause

#### Executive Order 14042, Ensuring Adequate COVID Safety Protocols for Federal Contractors

##### ENSURING ADEQUATE COVID-19 SAFETY PROTOCOLS FOR FEDERAL CONTRACTORS (OCT 2021) (DEVIATION)

(a) *Definition.* As used in this clause -  
*United States or its outlying areas* means—

- (1) The fifty States;
- (2) The District of Columbia;
- (3) The commonwealths of Puerto Rico and the Northern Mariana Islands;
- (4) The territories of American Samoa, Guam, and the United States Virgin Islands; and
- (5) The minor outlying islands of Baker Island, Howland Island, Jarvis Island, Johnston Atoll, Kingman Reef, Midway Islands, Navassa Island, Palmyra Atoll, and Wake Atoll.

(b) *Authority.* This clause implements Executive Order 14042, Ensuring Adequate COVID Safety Protocols for Federal Contractors, dated September 9, 2021 (published in the Federal Register on September 14, 2021, 86 FR 50985).

(c) *Compliance.* The Contractor shall comply with all guidance, including guidance conveyed through Frequently Asked Questions, as amended during the performance of this contract, for contractor or subcontractor workplace locations published by the Safer Federal Workforce Task Force (Task Force Guidance) at <https://www.saferfederalworkforce.gov/contractors> .

(d) *Subcontracts.* The Contractor shall include the substance of this clause, including this paragraph

(d), in subcontracts at any tier that exceed the simplified acquisition threshold, as defined in Federal Acquisition Regulation 2.101 on the date of subcontract award, and are for services, including construction, performed in whole or in part within the United States or its outlying areas.

The SFWIB Purchase Order Terms and Conditions can be located at <http://www.careersourcesfl.com/rfq-rfps-itns/>.

The SFWIB reserves the right to modify, make no award or cancel any award at any time if deemed by the SFWIB to be in the best interest of the SFWIB. When there are multiple line items in a solicitation, SFWIB

reserves the right to award on an individual item basis, or any combination of items, or in whichever manner is deemed in the best interest of SFWIB. The SFWIB shall be the sole judge of its best interest.

Upon the SFWIB's issuance and the Vendor's acceptance of a Purchase Order, the selected vendor(s) must completely fill-out, sign and return all required signatory pages within ten (10) calendar days of receipt of Purchase Order, agreement, or contract. Otherwise the SFWIB will exercise its option to cancel the award and proceed to select another vendor; or the selected vendor(s) will enter into a Professional Services Agreement (PSA) with the SFWIB. The SFWIB may, in the SFWIB's sole discretion, renew this Agreement for up to two (2) additional one (1) year performance periods contingent upon satisfactory performance and availability of funding to the SFWIB.

Matters pertaining to process or procedures, or questions about this RFQ must be submitted via e-mail to the e-mail address of the SFWIB Purchasing Agent identified in section II above. Vendors contacting other SFWIB staff risk immediate disqualification from the competitive procurement process.

## SCOPE OF SERVICES

The South Florida Workforce Investment Board (SFWIB) invites companies to respond to this Request for Quote (RFQ). SFWIB seeks a Facilitator to guide for the SFWIB Board's Strategic Planning Workshop and related services. The focus of the Workshop is to identify and set expectations for operational planning that aligns with the SFWIB's needs and mission.

### SERVICES TO BE RENDERED:

#### 1. Pre-Engagement Consultation

- Conduct one or more planning calls with the SFWIB Executive Director and designated staff to:
  - Understand organizational priorities and anticipated outcomes.
  - Review previous strategic planning outcomes and current initiatives.
  - Refine workshop objectives and clarify expectations.

#### 2. Strategic Research and Alignment

- Review relevant federal, state, and regional workforce policies, labor market data, and CSSF's current strategic plan.
- Analyze trends in workforce development, economic mobility, and employer engagement to ensure workshop materials align with SFWIB's direction and goals for 2025–2029.

#### 3. Workshop Agenda and Materials Development

- Design a customized agenda tailored to SFWIB's priorities, with materials that facilitate discussion around key themes:
  - Business and economic development outreach.
  - Work-based learning and career pathway expansion.
  - Integration of WIOA, TANF, SNAP, and partner services.
  - Participant-centered mobility and credentialing strategies.
  - System performance, board leadership, and strategic accountability.

#### 4. Workshop Facilitation

- Deliver a one-day, in-person strategic planning workshop in **Miami, Florida** (location and date TBD).
- Facilitate goal-oriented discussions with a focus on:
  - Reflecting on past progress and current performance.
  - Identifying emerging workforce challenges and innovations.
  - Establishing updated strategic goals and outcomes for 2025–2029.
  - Clarifying the Board's governance role in strategy execution.

#### 5. Post-Workshop Deliverables

- Prepare a written summary of key discussion points, consensus areas, and draft strategic goals.
- Recommend next steps for plan development, implementation, and accountability.
- Provide an evaluation or feedback tool to assess the effectiveness of the session.

## 6. Selection Criteria:

- Minimum of 3-5 years of experience in strategic planning
- Responses must describe prior collaborative efforts with other workforce boards.
- Flexible/available during the months of **September thru October of 2025**.
- All timely proposals received will be reviewed by SFWIB's employees to determine if they are responsive and if the proposals are eligible for further consideration.
- Proposals may be judged non-responsive and removed from further consideration if the proposal is not received timely in accordance with the terms of this RFQ; does not include the required attachments; and is not adequate to form a judgment by the reviewers that the proposal meets the needs of SFWIB and the intent of this RFQ

Additional data:

Telephone Conference	Vendor to call SFWIB to discuss the organization prior to developing workshop materials; exploring the issues, making sure the vendor knows what is most important and the workshop is delivered in excellence
Session	One (1) day face-to-face Workshop
Location	Miami, Florida (to be determined)
Date	To be determined
Material	Must be provided by the vendor
Follow-up	Vendor must provide Feedback/Evaluation
All travel-related costs and travel time	To be included in fee
SFWIB Liaison contact Telephone Conference	Will be provided to the selected vendor.

## **PURPOSE/OUTCOMES OF WORKSHOP:**

1. Build on the achievements of the current strategic plan and identify continuous improvement opportunities.
2. Refocus strategic priorities on business engagement, economic mobility, career advancement, and regional competitiveness.
3. Develop bold and measurable goals for the **2025–2029** strategic planning cycle.
4. Clarify the Board's role in championing, monitoring, and supporting the strategic agenda.
5. Outline clear next steps to complete and operationalize the new strategic plan.

## **RESPONDENTS TO THIS RFQ SHALL PROVIDE A DESCRIPTIVE NARRATIVE TO INCLUDE THE FOLLOWING:**

- A comprehensive action plan for implementing the requirements described in this Scope of Services. (Attachment 1)
- Detailed description of the organization's experience delivering the solicited facilitation for Strategic Planning Workshops with examples of prior experience and outcomes.

- Detailed description of the organization's experience with **Economic Development** with examples of prior experience and outcomes.
- Detailed description of the organization's experience with **Workforce Development** with examples of prior experience and outcomes.
- If satisfaction surveys were performed on any or all of the above examples, please provide a copy.
- Any additional information deemed necessary to reflect the organization's experience with the subject matter, including answers to questions on the Vendor Data Form and Questionnaire (Attachment 2).

## VENDOR DATA FORM AND QUESTIONNAIRE

Please provide the information below:

Company's Name	
Federal ID Number (EIN)	
Mailing Address	
Telephone/Fax	
e-mail address	
Contact Person's Name and Title	
Has your company been in business since July 2020 providing the same type of service under the same business name?	Yes/No If no, please explain in the Descriptive Narrative. *
How long have you been in business?	
How many facilitations has your business completed in the last 12 months? *	_____. Include description and examples in the Descriptive Narrative.
Does your business have experience in Economic Development? *	Yes/No. Include description and examples in the Descriptive Narrative.
Does your business have experience in Workforce Services? *	Yes/No. Include description and examples in the Descriptive Narrative.
Additional Education or certifications that acknowledges your experience and expertise. *	Include description and examples in the Descriptive Narrative.
Are you Currently registered with Florida Department of State (Sunbiz.org)	Yes/No.
Are you currently a registered Vendor with Miami-Dade County and/or the State of Florida	Yes/No
In the past twelve months, has your company provided facilitation services to a local, state, or federal government agency? *	Yes/No. Include description and examples in the Descriptive Narrative.

If other items require clarification, please address them in the **required Descriptive Narrative**.

\_\_\_\_\_  
Name of Authorized Representative

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date