Workforce Florida, Inc.
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Invitation to Negotiate
for
Advisory and Technical Assistance Services to
Newly Established Career and Professional Academies

October 24, 2011

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 newly established Career and Professional Academies, with a focus on Florida's middle school academies targeting foundational Information Technology (IT) skills certifications i.e. (Microsoft Office Specialist, Adobe Certified Associate and Certified Internet Web (CIW) Internet Business Associate, among others) for a one-year period. This objective is required by Chapter 2011 – 175, Laws of Florida, which states in s. 1003.493(6) that "Workforce Florida, Inc., through the secondary career academies initiatives, shall serve in an advisory role and offer technical assistance in the development and deployment of newly established career and professional academies."

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 an "Aligned, Responsive, Jointly Engaged Talent Supply Chain Team." To help Florida reach this goal, WFI remains in full support of the replication and diversification of Career Academies/Certifications through the alignment and coordination of Florida's Talent Supply Chain. The Talent Supply Chain represents an effort to create a seamless and outcome-oriented talent delivery system propelling Florida to national and global leadership in developing the right skills for the right industries at the right time.

Florida has seen great success with Career Academies since the passage of the Florida Career and Professional Education (CAPE) Act by the 2007 Florida Legislature, which has resulted to-date in approximately 1,509 registered career academies statewide with an estimated 172,713 student enrollments. Additionally, Governor Rick Scott, in his 2012 Job Creation and Economic Growth Agenda, has made it a priority to focus on Science, Technology, Engineering and Mathematics (STEM) in education. To date, of the 1,509 registered career academies noted above, 132 are designated as STEM career academies. Since IT skills are a core foundation for many STEM related occupations, and underpin the competitiveness of virtually *every* industry sector, the development and expansion of middle school IT career academies further supports Florida's goal of "growing your own" to better meet the demands of the 21st century workforce.

Although Florida continues to excel in its promotion and development of career academies and STEM related career academies; unfortunately, not enough high school students have access to these academies and of those who do, many of them are ill prepared for entry into an academy by the time they reach high school. Compounding this problem, Florida's Florida Board of Governors Interactive University Data, found at http://www.flbog.org/resources/iud/, shows that Florida's University system has seen a nearly 50% decline in the number of university bachelor degrees in IT areas over the past ten years.

In recognizing these concerns, the 2011 Florida Legislature, in its passage of Chapter 2011-175, Laws of Florida, now requires each district school board, in collaboration with regional workforce boards, economic development agencies, and state-approved postsecondary institutions, to include plans to implement a career and professional academy in at least one middle school in the district as part of the strategic 5-year plan pursuant to s. 1003.491(2), F.S. Additionally, the middle school career and professional academy component of the strategic plan now must ensure the transition of middle school career and professional academy students to a high school career and professional academy currently operating within the school district.

With the largest number of high school academies focusing on IT, currently at 242, and the potential for even middle school students to actually earn an IT industry-recognized certification, a logical place to focus is on the creation of middle school IT academies. Additionally, by focusing on (Microsoft Office Specialist, Adobe Certified Associate and Certified Internet Web (CIW) Internet Business Associate certificates, among others) districts will ensure the smooth transition of middle school career and professional academy students into a high school career and professional academy currently operating within the school district while increasing both the input and output of the local talent supply chain.

The goal of this initiative is to seek professional services to develop new middle schools IT academies focusing on an appropriate mixture of small, medium and large (rural and metro) school districts in Florida. Once a model, through this initiative, is established for IT academies, additional middle school academies can be implemented for other industry clusters and high demand occupational areas. Additional elements for respondents to consider are:

- Develop an Organization/Implementation Plan. This section shall (1) describe the timelines for developing and implementing the project, (2) address how the respondent plans to research and compile available resources such as implementation models, curricula framework, funding resources, IT vendors with which advantageous cost-sharing partnerships can be reached, etc., (3) address how the respondent plans to develop and implement the technical assistance resulting in the development of an identified number of middle school IT career academies statewide, and (4) describe plans to require middle school academies to collaborate with partners and key stakeholders such as business and industry, regional workforce boards, Florida Department of Education, STEM*florida* and other organizations to support the program.
- Communication and Outreach Plan. This section shall (1) describe the strategy to be used to effectively communicate the availability of the technical assistance for secondary academies, with a special emphasis on middle school IT academies. The respondent should clearly develop a plan of action to utilize technology in the delivery of these services. A kickoff event should be planned using webinar, phone conference and or other technologies to effectively communicate and reach all interested secondary school districts. A full description of the communication and outreach strategies should be clearly identified to ensure an appropriate fit for both the education and business sectors in this component. The respondent shall also outline how best to convey periodic summary reports to WFI's Board of Directors and other interested groups, including the Talent Supply Chain team members and Florida Legislature.
- Advisory Plan. The respondent should identify the strategy to be used to create a Middle School Career Academy Technical Assistance Council that can provide knowledge of workforce talent pipeline needs to include IT industry representatives, business interests,

training needs and emerging curriculum needs into new secondary school academies, specifically middle school IT academies.

- Technical Assistance Plan. The respondent should identify: (1) how and the number of middle schools receiving technical assistance will be selected, (2) in what forms the technical assistance will be offered (e.g., phone, virtual, face to face, workshops etc.), (3) priority of schools selected, i.e. small, medium and large (rural and metro) school districts statewide, working first with those school districts where IT secondary academies are in existence, (4) anticipated length of the assistance, and ultimately (5) the number of new middle school IT academies developed within the life of the project.
- Sustainability Plan. The respondent should offer recommendations and strategies on sustainability of the initiative subsequent to the expiration of public funds. After the grant funding ends at the 12-month grant period, how will the initiative continue? What components of the project are considered innovative and have applicability for replication in other areas? What components of the project make it relevant and/or essential to local business needs? How and why can it be marketed to other career academies? How can the model created under this initiative be replicated to other school districts not a part of this first year's work as well as to other industry sectors? How will each of the new IT academies utilize the funding generated through CAPE funding earned to further sustain their academy efforts?

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 firm within the following parameters:

1. Firm Longevity and Location. For a variety of reasons, the firm WFI selects must be located in the United States. To be considered, a firm 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 a firm that has significant experience in providing all phases for the preparation, development and launch of professional advisory and technical assistance services to newly established Career and Professional Academies, with a focus on Florida's middle school academies targeting foundational IT technical skills (i.e. Microsoft Office Specialist, Adobe Certified Associate and Certified Internet Web (CIW) Internet Business Associate, among others) certifications for a one year period. WFI also has interest in a firm's application of customer relationship management strategy and proposed uses of technology to organize, automate and deliver advisory and technical assistance to newly established Career and Professional Academies — principally middle school academies targeting foundational IT technical skills. That experience will be demonstrated by listing recent/current projects the firm has managed.

3. Capacity. WFI is interested in contracting with a firm 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 to Florida's newly established Career and Professional Academies, with a focus on Florida's middle school academies targeting foundational IT technical skills. WFI is not interested in contracting with a firm 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 firm's staff and describing in-house creative capabilities.

4. Workforce / Economic Development Experience. In addition to the general firm experience mentioned above, it will be a great advantage if a firm 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 a firm 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 firm's quality of performance, it would be an advantage to WFI if the firm and/or individuals within the firm have been recognized for exemplary achievement.

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

1. 'Firm Questionnaire' – Respondents will provide information regarding the firm 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 firm and its individual members. This work product may include copies of similar career academy technical assistance strategies completed by the firm to what is being requested through this solicitation. The work product should be 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 firm. 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 firms and that would of course be an opportunity to provide more examples of work product.

3. 'Firm'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 'Firm 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, Thursday, November 17, 2011:**

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

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 firms that are interested in establishing a contract with WFI to provide professional advisory and technical assistance services to newly established Career and Professional Academies and assessing the quality and capabilities of such potential contractors. WFI will review the responses and rank them 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 establish these rankings.

WFI may choose to request that one or more of the responding firms 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 **November 29, 2011**.

NOTE: When WFI has made its decision regarding which firm 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 company 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 firm 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 December 5, 2011.**

CONTRACT. The contract resulting from this ITN will be a two-party contract between WFI and the firm that is selected. Any subcontractors the firm may use from time to time during the course of the contract will not be a party to the firm'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. Firms should direct inquiries regarding this ITN to Dehryl McCall, Program Manager of Workforce Services, via email at the following address –

dmccall@workforceflorida.com

No phone calls please.

Workforce Florida, Inc.

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FIRM 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: Dehryl McCall. Please <u>follow this format</u> for preparing the response to this ITN. Responses must be <u>received</u> by Workforce Florida on or before 5:00 PM, Eastern, **Thursday, November 17, 2011:** Questions may be directed to Dehryl McCall via email at <u>dmccall@workforceflorida.com</u>**.**

1. Name of Firm (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**

5. *Experience* – List any current or recent (within the last 3 years) projects that demonstrate the firm's experience in successfully coordinating the development of in providing technical assistance to public/private educational systems such as secondary schools, technical centers, colleges, corporate training/continuing education providers and private vocational training providers. Respondents should also show strong examples of collaboration with secondary educational partners; business groups such as local economic development councils, chambers of commerce, business associations, STEM*florida*, Banner Centers; and industry and business leaders within the selected targeted industries. The successful respondent(s) should demonstrate a proven history of implementing effective collaboration with the identified essential partners. Respondents will be evaluated to determine their baseline knowledge level and knowledge around CAPE career academies and successful technical education assistance. Expertise reflected in respondents' response should also demonstrate:

1) Experience and knowledge in the start-up, development and enhancement of CAPE secondary career academies with a special emphasis on middle school IT academies;
2) A documented knowledge of secondary education, workforce and economic development;
3) The proven ability to work with and convene education, high-level business/industry, workforce, and other key stakeholders within Florida;

4) Effective outreach and communication experience;
5) Experience and knowledge surrounding IT related industry certifications through organizations such as such as Microsoft, Certiport, Adobe etc.; and
6) Experience in the uses of technology to organize, automate and synchronize the delivery of technical assistance.

Firms 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 firm. Work product from these contracts may be included. For each project list –
a) The organization with which the firm contracted;
b) The length of the contract;
c) The firm's current staff that were/are involved in the contract;
d) A description of the professional services that are/were provided by the firm 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; and
f) Any anecdotal information regarding the success of the program and how the information was used.

6. *Capacity* – Describe the firm's capacity to develop and manage professional advisory and technical assistance services to newly established Career and Professional Academies, with a focus on Florida's middle school academies targeting foundational IT technical skills (i.e. Microsoft Office Specialist, Adobe Certified Associate and Certified Internet Web (CIW) Internet Business Associate, among others.) Describe the firm's ability to negotiate cost-sharing opportunities with key vendors. This will include a list of the firm'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 *capacity* should also list any equipment or other resources the firm has that will help WFI determine the firm's ability to conduct a multi-faceted, statewide initiative.

7. *Workforce / Economic Development Experience* – List any experience the firm 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 firm 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 firm. 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. *Firm's Approach to ITN Request* – Provide a written outline and project summary on how the firm 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 firm's capability and the quality of its services.