

AD HOC RFP COMMITTEE REPORT

The Process:

The ad hoc committee was established in January 2022 to review and make recommendations around work2future's Request for Proposals (RFP) process. Overall, this process was highly productive in that it unearthed plentiful opportunities for the workforce investment board to become further engaged in stewarding valuable resources to benefit our community. Committee members included Louise Auerhahn, Rajiv Batra, Jack Estill, and Chad Bojorquez. The committee met together six times from January through June 2022 and established a process and scope for evaluation, reviewed and discussed best practices from around the country, and organized recommendations ranging from near to long term. These sessions included one meeting with work2future staff member Lawrence Thoo to get a baseline of the existing process and staff's perspective. Additionally, one of the sessions was a recorded interview with Shaina Gross from the San Diego Workforce Partnership, work2future's equivalent in San Diego. The committee also made a written request for information to the city attorney assigned to work2future and administrative staff. After the conclusion of the ad hoc, Chad Bojorquez compiled the committee's deliberations and information gathered into the following recommendations and resources:

Recommendations:

- 1) Undergo an intentional and comprehensive process to engage the entire board and staff in strategic planning around the City of San Jose's vision for work2future.

What impact do we want to have in our community? What is the change we want to see? Who do we want to serve, who will benefit the most from our services? How will we measure success? How are we coordinating and leveraging related workforce development efforts in our community? What additional resources do we need to be successful? What opportunities are there to maximize the talents and knowledge of the board and staff?

These are just some of the questions we must answer in order to create a unified, focused, and achievable direction for the work this Board oversees, and including senior staff that oversees all workforce development services (including those that fall outside the governance of this board) may help align strategic direction more widely.

Working to create a shared vision and strategic direction between staff and board will create a shared understanding and assist staff in creating future RFP scopes of work and evaluation criteria that align and contribute to our goals.

The ad hoc committee's immediate recommendation is to convene a half or a full day retreat for the board and staff to begin exploring these ideas. This will determine appetite, feasibility and scope, and potential next steps, and strengthen the engagement and connectedness of all board and staff members. We recommend hiring a consultant to plan and facilitate the session in partnership with at least one board member and staff member.

[most likely achieved through facilitation and strategic planning consultant, and leading to subcommittee(s) and or additional staff capacity and resources to implement strategies]

- 2) Establish formal opportunities for continuous improvement, including debriefs and feedback gathering from community stakeholders (consumers, potential partners, existing partners, review panelists, staff, etc.).

[most likely achieved through a standing subcommittee and/or additional staff capacity to regularly engage board and other stakeholders]

- 3) Document, share, and add to the existing RFP process to ensure board members have adequate information to make informed decisions, including:
 - a. Include names of the evaluators and aggregated summaries of the evaluations or ratings in board review materials (per City Attorney and in accordance with the Sunshine Ordinance, shall be made available if requested)
 - b. Collect references and/or letters of recommendation as part of evaluating potential vendors
 - c. Ensure adequate discussion is happening among all review panelists, following the City's Evaluator Guidelines: "In a team setting, all evaluators will be asked to provide a verbal summary of each proposal, and explain their resulting scores and rankings."
 - d. Revise "boilerplate" sections of RFP documents and orientation materials to help orient and attract applicants. These changes ideally based on solicited input from past applicants, examples from other communities, and/or results of Recommendation #1
- 4) Provide consistent and robust training/orientation and logistical support when needed (e.g., transportation assistance, information, access to technology) to all staff, board members, and volunteers involved in implementing an RFP (including review panelists).
- 5) Include at least one person with lived experience (e.g., current, prospective, and former participants of Work2Future services) into each RFP selection process. The City's Evaluator Guidelines indicate that reviewers will be "subject matter experts with knowledge of the service or combination of products and services being proposed."

[the above three recommendations most likely achieved through additional staff capacity to develop and implement necessary policies and practices]

- 6) Request that every board member and staff review the reference materials, identify follow-up questions and areas of interest, and place time on our next agenda to reflect and discuss. As a result, additional related recommendations may be proposed and/or requested for discussion at a future board meeting

Further Information, Resources, Reference Materials:

San Diego Workforce Partnership (joint City/County RFP):

- Video recording of meeting with Shaina Gross of the San Diego Workforce Partnership
- Transcription of the meeting with Shaina Gross of the San Diego Workforce Partnership
- Sample RFP Timeline
- WIOA Youth RFP framework deck
- San Diego RFP – Website Youth RFP 2020:
<https://workforce.org/rfps/2020/07/08/youthrfp2020/>
- San Diego RFP – Population Specific
- San Diego RFP – One-Stop
- San Diego RFP – Youth – Respondents Orientation
- San Diego Workforce Partnership Local Plan Draft

Others

- California Workforce Development Assessment (immigrant population) Contra Costa
- Written Q&A with City Attorney (including referenced attachments)
- Written Q&A with Staff (including referenced attachments)

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By Chad Bojorquez, Ad Hoc RFP Committee Chair