

## ***Workforce Florida, Inc.***

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### **Invitation to Negotiate for Customer Relationship Management (CRM) Solution--Technical Assistance Services**

**December 13, 2013**

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**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 aimed at providing CRM implementation, comprehensive training and ongoing technical support services to WFI and regional workforce boards for a recently launched pilot CRM solution on the Salesforce platform. The CRM solution is a component of a comprehensive strategy to increase business usage of Florida's workforce system and to create a structured business development process that provides a business customer experience that is seamless, consistent, predictable and outcome-based statewide. This objective is consistent with the WFI Board Chairman's goals for 2013, one of which is to ensure Florida's workforce system is business and industry led.

Currently, Florida has a modest business usage rate, as measured by the Department of Economic Opportunity's Employer Penetration Report. On average, about 40,000 businesses receive services monthly from Florida's workforce system (out of a total of approximately 580,000 businesses that pay unemployment taxes statewide). The most recent data provided through this report indicates that statewide, Florida's workforce system serves less than 5.0% of businesses (Fourth Quarter, 2012 data). By growing the business segment, the ability to get Floridians employed is exponential and drives the Governor's agenda of growing jobs and reducing unemployment.

WFI is working alongside 12 other states nationwide, through a U.S. Department of Labor grant to expand business engagement. The *Expanding Business Engagement* Initiative has as its goals setting system wide goals for strengthening Florida's workforce system's business services and identification of key performance indicators of our current business offerings; assessing the workforce system's infrastructure and acquiring system capabilities to help track, measure and report on these specific performance measures; and supporting the delivery of one system. Several of the states as well as a few of Florida's regional workforce boards are utilizing a CRM platform and have provided WFI guidance in the development of a CRM solution for Florida's workforce system. For these reasons, the goals of the initiative are consistent with the purpose of this ITN.

**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 grants 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.

Potential respondents are encouraged to visit the WFI web site at [www.workforceflorida.com](http://www.workforceflorida.com) for more information about WFI and Florida’s workforce system as well as the Employ Florida Marketplace at [www.employflorida.com](http://www.employflorida.com).

**CONTRACTOR QUALIFICATIONS.** Through this ITN, WFI intends to select and negotiate a contract with a professional organization within the following parameters:

1. **Organization Longevity and Location.** For a variety of reasons, the organization WFI selects must be located in Florida. To be considered, an organization 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 an organization that has significant experience in providing CRM implementation and maintenance, comprehensive training and ongoing technical support services on the Salesforce platform as we launch a recently developed CRM solution for Florida’s workforce system. WFI also has interest in an organization’s application of customer relationship management strategy and proposed uses of technology to organize, automate and synchronize business processes—principally customer service activities. That experience will be demonstrated by listing recent/current projects the organization has managed.
3. **Capacity.** WFI is interested in contracting with an organization that has significant in-house capacity and is able, as much as possible, to develop and manage this project within its own capacity. WFI is not interested in contracting with an organization 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, industry certifications and work experience of the organization’s staff and describing in-house creative capabilities, with strong preference given to organizations with staff that have earned credentials from Salesforce.com.

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

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

1. ‘Organization Questionnaire’ – Respondents will provide information regarding the organization 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(s) that they feel best illustrates the capabilities and talents of the organization and its individual members. This work product(s) may include examples of similar CRM implementation, training and support services completed by the organization to what is being requested through this solicitation. The work product should be a 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 is still with the organization. Respondents should exercise some discretion when it comes to providing work product. Work product(s) are a part of the review process. Therefore, there is no obligation on the part of WFI to return work products. It is WFI’s intent to conduct a personal presentation by one or more of the responding organizations and that would of course be an opportunity to provide more examples of work product.
3. ‘Organization’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, training methods 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 ‘Organization Questionnaire’ and six copies of work product(s) the respondent may wish to provide must be submitted to the address below **not later than 5:00 PM, Eastern, Thursday, January 9, 2014:**

**Fay Malone  
Department of Economic Opportunity  
MSCG-229  
107 E. Madison St.  
Tallahassee, FL 32399**

**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 organizations that are interested in establishing a contract with WFI for professional services. WFI will review the responses and evaluate proposals 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 evaluate proposals.

WFI may choose to request that one or more of the responding organizations 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 January 20<sup>th</sup>, 2014**.

NOTE: When WFI has made its decision regarding which organization 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 organization 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 most suitable respondent 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 January 27, 2014**.

**CONTRACT.** The contract resulting from this ITN will be a two-party contract between WFI and the organization that is selected. Any subcontractors the organization may use from time to time during the course of the contract will not be a party to the organization'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.** Organizations should direct inquiries regarding this ITN to Andra Cornelius, CEcD, Senior Vice President for Global Talent Innovation, via email at the following address –  
[acornelius@workforceflorida.com](mailto:acornelius@workforceflorida.com)

No phone calls please.

*Workforce Florida, Inc.*

**Invitation to Negotiate (ITN)  
for  
Customer Relationship Management (CRM) Platform--Technical Assistance  
Services**

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**ORGANIZATION QUESTIONNAIRE**

Please provide the information requested in this questionnaire and submit six (6) copies of the questionnaire responses and six (6) copies of samples of work product(s) to:

Department of Economic Opportunity  
ATTN: Fay Malone  
MSCG-229  
107 E. Madison Street  
Tallahassee, Florida 32399

Please follow this format for preparing the response to this ITN. Please note there is no obligation on the part of WFI to return proposal submission documents to include work products.

**Responses must be received on or before 5:00 PM, Eastern, Thursday, January 9, 2014:** Questions may be directed to Andra Cornelius via email at [acornelius@workforceflorida.com](mailto:acornelius@workforceflorida.com).

<b>A. Name of Organization (FEID #):</b>	
<b>B. Address:</b>	
<b>C. Contact Information:</b>	
<b>1) Contact Name &amp; Title:</b>	
<b>2) Contact Phone #</b>	
<b>3) Contact Fax #</b>	
<b>4) Contact email address</b>	
<b>D. Number of Years in Business Under Above Name</b>	/yrs

**1. Experience** – List any current or recent (within the last 3 years) projects that demonstrate the organization’s experience in successfully coordinating CRM implementation, training and support services. Also list the organization’s experience in application of the process and proposed uses of technology to organize, automate and synchronize business processes—principally business service activities. Organizations 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 organization. Work product from these contracts may be included. For each project list –

<p>a) The organization with which the organization contracted</p> <p>b) The length of the contract</p> <p>c) The organization’s current staff that were/are involved in the contract</p> <p>d) A description of the professional services that are/were provided by the organization including the methodology followed; the tasks, timeline and deliverables executed; and the budget parameters</p> <p>e) Describe whether this project was done totally in-house, primarily in-house or primarily by outside sources</p> <p>f) Any anecdotal information regarding the success of the program and how the information was used.</p>
<p><b>2. Capacity</b> – Describe the organization’s capacity to perform CRM implementation, training and support services within its own capacity. This will include a list of the organization’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 <i>capacity</i> should also list any equipment or other resources the organization has that will help WFI determine the organization’s ability to conduct a multi-faceted, statewide initiative.</p>
<p><b>3. Workforce / Economic Development Experience</b> – List any experience the organization has had providing services to a ‘workforce’ or economic development organization, and any of the partner organizations noted in the ‘<i>Purpose</i>’ 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 1. Experience, above.</p>
<p><b>4. Noteworthy Accomplishments &amp; Awards</b> – List and provide a brief description of any awards the organization or individual staff members have received during the last three years. List the entity that made the award.</p>
<p><b>5. Work Product</b> – 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 organization. Respondents should identify if they developed the product or whether it was developed in conjunction with a third party – <b>WFI’s preference is that respondents only include work product they have developed.</b></p>
<p><b>6. Organization’s Approach to ITN Request</b> – Provide a written outline and project summary on how the organization intends to approach the task as outlined in the ITN. Key work product deliverables, timelines, training methods and engagement of collaborative partners should be noted with full explanations and justifications to affect the highest outcomes envisioned by WFI.</p>

**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 organization’s capability and the quality of its services.**