

CareerSource Florida

Invitation to Negotiate
Benefits Private Exchange
September 9, 2014

PURPOSE. The purpose of this Invitation to Negotiate (ITN) is to elicit responses from organizations interested in contracting with CareerSource Florida to provide insurance brokerage services and professional advisory and technical assistance to:

- (1) Review and analyze the CareerSource Florida Network's current employee health and wellness benefit plans and recommend alternative benefit designs or delivery systems for the purpose of transitioning to a comprehensive employee ***Benefits Private Exchange***.
- (2) Develop a Benefits Comparison Report detailing opportunities for the CareerSource Florida Network, employee benefit enhancements, positive impact statements for CareerSource Florida and participating regional workforce boards, program cost-effectiveness and recommendations to provide an employee ***Benefits Private Exchange***.
- (3) Develop and implement an employee Benefits Transitional Plan for CareerSource Florida and participating regional workforce boards, to include a timeline to design and restructure employee benefits, conduct employee training, education, and benefit plan enrollment and provide final documentation as may be required by CareerSource Florida.

One of the six strategic goals identified in CareerSource Florida's Strategic Plan "[Creating the Strategy for Today's Needs and Tomorrow's Talent](#)" 2010-2015 is "Dedicated Commitment to Change Management and Transformation." One of the achievements under this goal relates to the "Strategic Goals and Achievements for Human Resource Assessments and Incentives and Key Focus for Operationalism."- To help CareerSource Florida reach this goal, CareerSource Florida is seeking consultancy and management of a statewide employee ***Benefits Private Exchange***.

CareerSource Florida is governed by a business-led Board, appointed by the Governor. The Board seeks to design strategies to develop Florida's talent and respond to workforce demands and challenges, both today and on the horizon. The CareerSource Florida values includes:

Continuous Improvement: Driven by our commitment to excellence, we respond to changing market dynamics. We continually strive to improve our performance to better anticipate and address talent needs of employers and the employment and skill needs of job seekers and workers. We identify, measure and replicate success.

It is important to ensure that the human resource needs of the CareerSource Florida Network are met through continuous examination of strategies to provide staff development, employee incentives and strong employee benefits programs. In addition, the CareerSource Florida Board of Directors believes one method to improve the outcomes of the workforce system is through sharing of administrative services when practical. ***This employee Benefits Private Exchange is in support of the Board's goals and corporate values, and will reduce administrative costs across the CareerSource Florida Network, which will allow more resources to be available to improve outcomes.***

Respondents should be prepared to offer employee benefit solutions, including modifications to existing employee benefit programs and other employee benefit strategies to enhance the CareerSource Florida Network's employee group benefits opportunities. Additionally, potential respondents should be prepared to analyze and present employee group benefits recommendations.

CareerSource Florida anticipates potential presentations with the Career Source Florida President, Executive Leadership Team, professional staff and HR Expertise, Inc. – CareerSource Florida's human resources management and service provider.

BACKGROUND. CareerSource Florida 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 CareerSource Florida 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 CareerSource Florida and the delivery of workforce services. CareerSource Florida is a statewide organization managed by a president and professional staff. The Operations office is 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 CareerSource Florida. 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, CareerSource Florida 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. CareerSource Florida 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 CareerSource Florida website: www.careersourceflorida.com.

PROCUREMENT AUTHORITY

There is created a not-for-profit corporation, to be known as "Workforce Florida, Inc.," which shall be registered, incorporated, organized, and operated in compliance with chapter 617, and which shall not be a unit or entity of state government and shall be exempt from chapters 120 and 287. Workforce Florida, Inc., shall apply the procurement and expenditure procedures required by federal law for the expenditure of federal funds. (445.004 (1), F.S)

For purposes of procurement, regional workforce boards and their administrative entities are not state agencies and are exempt from chapters 120 and 287. The regional workforce boards shall apply the procurement and expenditure procedures required by federal law for the expenditure of federal funds. (445.007 (9), F.S.)

CareerSource Florida and the Regional Workforce Boards are subject to the federal procurement requirements. (2 CFR 200.318 through 200.326).

To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal government, the non-Federal entity is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services. (2 CFR 200.318 (e)) (29 CFR 97.36 (b) (5))

CONTRACTOR QUALIFICATIONS. Through this ITN, CareerSource Florida intends to select and negotiate a contract with an individual or consulting organization within the following parameters:

1. **Organization Longevity and Location.** For a variety of reasons, the organization CareerSource Florida selects must be located in the United States. 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. CareerSource Florida is interested in contracting with an organization that is an insurance brokerage firm and has significant experience in employee benefits consulting and technological tools.
3. Capacity. CareerSource Florida is interested in contracting with an organization that has significant in-house capability to provide and implement a Florida statewide employee **Benefits Private Exchange**. CareerSource Florida is not interested in contracting with an organization that is routinely required to utilize a number of outside contractors over which CareerSource Florida has no control.
4. Non-Profit Organizational Experience. In addition to the general employee benefits experience mentioned above, it will be a great advantage if an organization has some practical knowledge and experience working with non-profit organizations.
5. Noteworthy Accomplishments & Awards. As a partial measure of the organization's quality of performance, it would be an advantage to CareerSource Florida 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:

1. Organization Questionnaire. Respondents will provide information regarding the organization that addresses the preferences listed above. This information will be collected via completion of an [online form](#).
2. 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, and engagement of collaborative partners should be noted with full explanations and justifications to affect the highest outcomes envisioned by CareerSource Florida.
3. Examples of Work Product. Respondents will provide examples of work product, completed within the last three years, that they believe best illustrates the capabilities and talents of the organization and its individual members to meet the requirements of this solicitation. Each product 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. Respondents will also provide a demonstration of their employee **Benefits Private Exchange** platform and its technological capabilities. It is CareerSource Florida'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 and technical expertise.

SELECTION. Potential respondents are reminded that this is not a bid nor a Request for Proposals and, therefore, CareerSource Florida 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 CareerSource Florida to provide brokerage services and professional advisory and technical assistance services to implement an employee ***Benefits Private Exchange***. **CareerSource Florida** will review the responses and evaluate proposals based on what CareerSource Florida deems to be the most suitable and qualified. CareerSource Florida retains the sole authority for developing and applying the criteria it will use to evaluate proposals.

CareerSource Florida 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 CareerSource Florida headquarters on Waldo Palmer Lane. CareerSource Florida, at its sole discretion, may determine that a personal presentation(s) is not necessary. Tentatively, CareerSource Florida plans to schedule presentations, if necessary, the **week of October 13, 2014**.

NOTE: When CareerSource Florida 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. CareerSource Florida 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) commissions and/or fees. If negotiations are unsuccessful, CareerSource Florida retains the right to initiate contract negotiations with the most suitable respondent and continue that process until it successfully negotiates a contract. CareerSource Florida retains the sole authority to make its selection based on what it determines to be in its best interest. CareerSource Florida, at its sole discretion, may reject any and all responses as not meeting the needs of this project. CareerSource Florida **anticipates that a selection decision will be made sometime during the week of October 20, 2014**.

CONTRACT. The contract resulting from this ITN will be a two-party contract between CareerSource Florida 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 CareerSource Florida. The contract will include a provision that at any time during the process of obtaining quotes, evaluating insurance provider options, and finalizing the participation in the benefits private exchange, CareerSource Florida reserves the right to cancel the procurement at no cost to CareerSource Florida or any regional workforce board. It is anticipated that the resulting contract will be for a maximum of five years 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 Scott Fennell, Chief Operations and Financial Officer (COO/CFO), via email at the following address:

sfennell@careersourceflorida.com

No phone calls please.