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**Request for Proposals - Strategic Planning Consultant
November 8th, 2021**

I) Overview

RochesterWorks, Inc (hereafter, also known as "RWI"), on behalf of the Monroe County/Rochester Workforce Development Board, has released the following Request for Proposals (RFP) for consultant services to facilitate the development of a three-to five-year strategic plan. The successful applicant (hereafter, "the firm") to this RFP will work closely with the RWI Executive Director, key staff as well as several members of the Board of Directors. All responses to this RFP are due no later than Monday, December 6th, 2021 at 4:30pm, using the process outlined below.

Qualified respondents to this RFP are firms with thorough experience with nonprofit strategic planning, ability to guide a facilitated stakeholder engagement process, and knowledge of Diversity, Equity and Inclusion principles, particularly with public facing, human service non-profits.

The firm selected is not intended to be responsible for executing all aspects of the strategic planning process, but rather, to facilitate the organization and overseeing the development of a final strategic plan.

The firm will work with a Strategic Plan Steering Committee comprised of RWI Staff and Board members. RWI will contribute significant time towards the facilitation, development and adoption of the final Plan. **It is the expectation that the firm will manage the overall process.**

II) About RochesterWorks, Inc

RochesterWorks, Inc (RWI) was established in 2004 and provides employment and training services to Monroe County through three local career centers and one specialized youth employment services center. A registered 501(c)3, RWI provides a unique set of customized services to businesses and job seekers at little-to-no cost, preparing a skilled workforce and connecting them with career opportunities in the Rochester region. It serves as a fiscal agent for Monroe County, designated to administer Federal workforce development funds. On behalf of the Monroe County/Rochester Workforce Development Board, RWI manages approximately \$7-\$9 million in employment and training resources, and is the largest, most comprehensive provider of workforce development services in Monroe County.

RWI's primary funding source is from the Workforce Innovation & Opportunity Act (WIOA), which is generally broken up into three primary silos: Adult, Adult Dislocated Workers & Youth (17-24). For the most recent program year, the Monroe County/Rochester Local Workforce Development Area was allocated

approximately \$5.5 million in WIOA funds. RWI spends its WIOA dollars under the oversight of the NYS Department of Labor, which must demonstrate compliance to WIOA to US Department of Labor. RWI receives additional revenue – some recurring, some not – through NYS, foundations and other sources.

RWI operates three One-Stop Career Centers as part of the American Job Center network. It's largest career center, located at 100 College Avenue, provides a variety of career services and job training opportunities for adult job seekers and dislocated workers (generally those who have had their job eliminated, under a variety of circumstances). Additionally, RWI operates a Youth Employment Services bureau in downtown Rochester, in the same building that houses the City of Rochester's Recreation Bureau. The Youth division offers similar services to area residents between the ages of 18-24, as well as the Summer Youth Employment program, which provides employment experience for hundreds of teens annually. RWI also has an affiliate Career Center, which is co-located with the Monroe County Department of Human Services at a County facility, and provides work experience opportunities, job readiness training and other services to adults receiving public assistance. Furthermore, RWI houses a business services division, which works with area employers to promote job openings, fund on-the-job training opportunities, and help ensure RWI services are aligned with the needs of the local economy. Prior to the pandemic, RWI did have allocated staff at the NYS Department of Labor's Career Center on Waring Rd in Northeast Rochester.

Why is RochesterWorks looking to engage in a strategic planning Process?

While it is a licensed 501(c)3, RWI is far from a typical non-profit. It provides workforce services on behalf of Monroe County and the City of Rochester, using primarily federal funds that are thoroughly regulated and monitored by the State of New York. With the lingering short and long-term impacts of COVID-19 on the world economy, the field of workforce development finds itself in a very critical and dynamic time. Locally, the workforce is not meeting the demands of the economy, with tens of thousands of unfilled positions among Rochester area employers. This disconnect is not unique to Rochester, as it is being experienced nationally. The City of Rochester has one of the highest poverty rates in the nation, with substantially higher unemployment that which is found in the suburbs. With the influx of federal funding as part of the COVID-19 recession – including the 2020 CARES Act, the 2021 American Rescue Plan Act (ARPA) and the possible Build, Back Better social program - it is not unreasonable to declare that the next several years will see many opportunities for the non-profit sector to seek grant opportunities to increase their bandwidth. In fact, Monroe County recently included "workforce development" as one of the several priority areas of investment as it drafts a plan to invest its \$144 million ARPA investment. The City of Rochester recently allocated \$13 million in ARPA funds for economic opportunity projects, including workforce development.

Local workforce development boards are not meant to provide the whole spectrum of workforce development services for the community. Monroe County, like other communities, has many programs that aims to connect youth and adults with quality careers. This includes assets like Monroe Community College, various

apprenticeship and pre-apprenticeship programs, industry-driven training opportunities, certification and credential programs, among others.

As the largest provider of workforce development, job training and career services in the county, RochesterWorks needs to determine if it is capable and primed to play a larger role as a convener for the workforce system.

III) Scope of Work/Responsibilities of Consultant

In developing this three (3) to five (5)-year strategic plan, the firm will work with the Steering Committee to:

- Develop an effective process for the development of the strategic plan, acting as principal liaison to staff for delivery of messages and feedback.
- Engage stakeholders including, but not limited to, staff, key members in the workforce development and business community, program participants, key partner organizations, policymakers and members of the workforce development board
- Detail the current landscape of workforce development in Monroe County, and if RochesterWorks is poised to take a larger role in convening the growing system. This may include creating a Resource Map for the area workforce development system.
- Re-evaluate RochesterWorks' mission and strategic vision
- Clearly articulate goals for the organization to fulfill its mission and vision
- Provide a scan of the RWI organizational culture, and identify strengths and opportunities for improvement with regards to employee, partner, and customer experience
- Help provide a pathway for RochesterWorks to ensure it is doing its part as a community organization to promote diversity, equity, and inclusion for all residents of Monroe County
- Coordinate the writing and editing of drafts and the final strategic plan document
- Determine, with the Steering Committee, the appropriate timeframe of the strategic plan (3 to 5 years)
- Present, with RochesterWorks leadership, the strategic plan to both RochesterWorks staff and the Workforce Development Board

IV) Interaction with the “Local Plan”

While RochesterWorks has never, as an organization, engaged in a traditional strategic planning process, it is responsible for developing a for developing a Four-year WIOA Local Plan and Four-Year WIOA Regional Plan, which is adopted by the workforce development board and provided to the NYS Department of Labor for approval. These [documents](#), which were most recently revised and approved in Summer of 2021, provide a good summary of how RochesterWorks will live up to its statutory charge of ensuring the workforce development and training system is aligned with the needs of the local economy. The Local Plan does not, however, focus on organizational structure and culture, nor does it take a comprehensive look at the future growth and viability of the organization, rather concentrating

more on the metrics used to guide the various training programs and strategies adopted and implemented by RochesterWorks.

V) Proposal Format

Responses to this RFP shall be guided by the following outline and will be evaluated on a 100 point scale, weighted as indicated below:

- A. Background about your organization and general approach to strategic planning - 10 points
- B. Summary of strategic planning experience with non-profit organizations - 15 points
- C. A proposed workplan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project including a tentative timeline - 20 points
- D. Qualifications of applicant and consulting staff who will be assisting with the project - 15 points
- E. Project budget, including an hourly rate inclusive of all costs, and an estimate of total hours of work broken down by activity - 25 points
- F. Proposed division of labor between consultant firm and Steering Committee – 5 points
- G. One previous strategic plan in which the applicant took part in developing - 5 points
- H. Listing of three (3) client reference, particularly organizations for whom the firm has provided strategic planning services - 5 points

VI) Application Process

Questions regarding this RFP must be submitted by Wednesday, November 24th, 2021 at 4:30pm. Final responses to this RFP must be submitted by Monday, December 6th, 2021 at 4:30pm. Questions and final applications must be submitted to Lee Koslow, Technical Assistance & Training Manager at LKoslow@RochesterWorks.org.

The Steering Committee will evaluate all applications and shall reserve the right to interview as many firms as it deems necessary. Incomplete applications may result in non-consideration by the Steering Committee.

VII) Timeline

Monday, November 8 th , 2021:	Request for Proposals issued
Wednesday, November 24 th , 2021, 4:30pm:	Final day to submit questions
Monday, December 6 th , 2021, 4:30pm:	Deadline for proposal submission
Week of December 13 th , 2021:	Interviews with finalists
Tuesday, December 21, 2021:	Selection of Firm by Local Board
No later than January 15 th , 2022:	Contract executed
Mid-February 2022:	Kickoff meeting with RWI team