



REQUEST FOR QUOTE (RFQ) Search Firm for Position of Chief Executive Officer

ISSUED:
RFQ No. 22-0412

1. OVERVIEW

CareerSource Pinellas is soliciting quotes from an outside, independent firm to conduct a national search (“Services”) for filling the position of Chief Executive Officer.

A. RFQ Timeline

Action	Date
Issue RFQ	April 12, 2022
Responses to RFQ Due	May 3, 2022
Proposal review and evaluation	May 4 – May 18, 2022
Vendor Approval	May 26, 2022 (Board meeting)
Contract Negotiations	As soon as approval occurs
Contract Start	As soon as contract signed

CareerSource Pinellas is funded entirely by federal grants. Accordingly, 100% of the cost will be financed with federal funding from the US Departments of Labor, Health and Human Services and Agriculture as part of awards totaling approximately \$11,103,000.

B. Proposal Submission

Quotes must be received no later than May 3, 2022, at 5:00 PM. Proposals may be sent via U.S. Mail, Courier, Hand Delivered or emailed to the location and individual indicated below:

CareerSource Pinellas
Attn: Steven Meier, Interim CEO
13805 58th Street North, Suite 2-140
Clearwater, FL 33760

If emailing a Response, it must be submitted as a single pdf document, inclusive of all attachments and be submitted to: rfp@careersourcepinellas.com.

2. BACKGROUND OF ORGANIZATION

WorkNet Pinellas, Inc. dba CareerSource Pinellas, is a 501(c)(3) non-profit organization. CareerSource Pinellas entered into an interlocal agreement with Pinellas County Board of County Commissioners (BCC) to provide workforce services for all programs under the federal Workforce Innovation and Opportunity Act (WIOA). CareerSource Pinellas is certified to serve as Region 14 Local Workforce Development Board for Pinellas County by the Florida Governor, whose responsibility has been delegated to CareerSource Florida, Inc., the state workforce board. This public-private partnership supports and promotes economic growth through workforce development. CareerSource Pinellas is one of twenty-four local workforce development boards in Florida. The BCC oversees certain functions of CareerSource Pinellas, including the hiring of its CEO, which the BCC must approve. CareerSource Pinellas is subject to the Sunshine Law and Public Records Law. Accordingly, all meetings of the CareerSource Board of Directors must comply with the Sunshine Law and the records of CareerSource Pinellas must be maintained and available for inspection or copying under the Public Records Law.

3. SCOPE OF SERVICE

A. Purpose

To obtain the services of an outside, independent firm to conduct a national search for a Chief Executive Officer. The firm will perform the recruitment and screening necessary to provide the Board of Directors with a list of up to fifteen (15) of the highest caliber of candidates who are qualified and interested in the position. The Board of Directors will make a final selection from this list, however, the Board of Directors selection is subject to approval by the BCC.

Background information about the position of Chief Executive Officer is contained in Attachment A.

B. Scope of Work

CareerSource Pinellas wishes to employ a firm to conduct a national search for the purpose of identifying high quality applicants for the position of Chief Executive Officer from which the Board of Directors may make a final selection, subject to approval by the BCC.

The search is to result in the development of a list of candidates interested in the position who possess the qualities, experience, and training defined by the Board of Directors. Based on an analysis of the background, education, training, experience, and other desirable qualities of the candidates a final list of up to fifteen (15) candidates is to be provided to the Board of Directors for their consideration.

The firm should provide the following services as a minimum but not be limited to:

- A. Providing written bi-weekly activity reports summarizing and detailing the progress of this employment search. Agree to respond immediately to any/all inquiries from the Board of Directors or BCC related to the progress of this employment search.
- B. Consulting with the members of the Directors to develop/determine the profile (background, education, training, experience, knowledge, skills, abilities, management style, and other appropriate characteristics) desired of the individual to be selected as Chief Executive Officer.
- C. Developing a strategy for carrying out the recruitment, including outreach to qualified candidates who might not otherwise express an interest, whether currently employed or not, to encourage applicants from diverse backgrounds to apply. Recruitment strategy should include other Local Development Workforce Boards, State Level Workforce organizations, National Workforce Associations, and any additional appropriate venues identified by the firm.
- D. Reviewing resumes of all applicants for background and qualifications to identify up to fifteen (15) candidates who present the most promising qualifications for the position of Chief Executive Officer.
- E. Conducting interviews (by phone, video-conference or face-to-face) with candidates identified above (Step D) to clarify each applicant's experience and to prepare a written summary of the candidates.
- F. Further evaluating the candidates including review of the interview results and conducting in-depth reference checks with individuals who are or have been in positions to evaluate the performance of the candidate on the job to produce a list of at least eight (8) and no more than fifteen (15) candidates who merit the most consideration for the position of Chief Executive Officer.
- G. Verifying the educational background and experience of the selected candidate (or candidates), and conducting criminal, financial, newspaper, and civil litigation check.

- H. In the event politically-sensitive or potentially embarrassing issues arise in a candidate's background, to conduct in-depth interviews with principle parties to clarify the event in order to clearly describe the event to the Board members.
- I. Finalizing a process with the Board of Directors for interviews and coordinating candidate's participation in interviews.
- J. Debriefing with the Board of Directors following the interviews and identifying additional candidates if necessary.
- K. Presenting the Board of Directors selected candidate to the BCC for approval.
- L. Assisting the Board of Directors with the negotiation of the contract (including compensation and relocation) with the selected candidate/finalist, at the option of the Board of Directors.
- M. Notifying non-selected applicants and candidates.
- N. Maintaining and allowing for inspection or copying all records related to the CEO hiring process in accordance with the Public Records Law.
- O. Ensuring all meetings with the Board of Directors and BCC are conducted in accordance with the Sunshine Law.

The Board of Directors will entertain alternate proposals which achieve the Board's purpose of obtaining a successful placement.

4. QUALIFICATIONS AND REQUIREMENTS

The following requirements should be addressed and submitted as part of your written response. Failure to comply will severely weaken your proposal's evaluation score and could result in your proposal receiving minimal or no consideration.

A. Information about the Firm:

1. Full Legal Name of Company.
2. Primary Contact.
3. Contact Information: Company Address; Phone Number, Fax Number, E-mail address.
4. How long has the firm been in business under the present name and structure? Provide any other names under which the firm has done business and the date it operated under each name and the locations at which it operated under each name.
5. State of Incorporation/Formation and the date incorporated/formed/qualified to do business.
6. Type of Entity (Corp., Gen. or Ltd. Partnership, etc.).
7. Identify the President, Vice President, Secretary, Treasurer, and Director/General Partner/Partners/Members. Indicate whether each is active and if in good standing.
8. Indicate whether the firm is a Florida corporation and whether the firm is qualified to do business in Florida.

9. Are you affiliated with any other business entity, i.e., are you a subsidiary, do you have subsidiaries or joint partnerships? If yes, please identify the organization(s) and the relationship(s).
10. How long has the company been at the location which you designated above as the company address? How many other company locations do you have and in what cities are they located?
11. Current total number of individuals employed by the firm nationally and total number of individuals employed at the above listed address.
12. What is the focus of your firm (what are the primary purposes of the firm)? What are the primary markets served?
13. Does your firm offer outplacement and/or career counseling to executives? If so, what percent of your business is outplacement and/or career counseling?
14. Is your firm an active/current member of the Association of Executive Search Consultants (AESC)?

If your firm is not a current AESC member, is it willing to abide by/adhere to the Professional Guidelines and Ethics of the Association of Executive Search Consultants (AESC)?

15. Provide a detailed description of comparable public and private contracts (similar in scope of services to those requested herein) which the Proposer has either ongoing or completed within the past three years. The description should identify for each project: (i) the client, (ii) description of work, (iii) total dollar value of the contract, (iv) contract duration, (v) customer contact person and phone number for reference, (vi) the results of the project, and (vii) tenure of the selected candidate in the position. Where possible, list and describe those projects performed for governmental clients or similar size private entities.
16. How many other assignments is the firm currently handling, and what is the timetable for completing those assignments?
17. How many searches have you done for positions of Chief Executive Officer for Local Workforce Boards? Of these, how many were for jurisdictions with populations of one million or more?
18. Provide at least five (5) references (at least three (3) of which should be similar organizations to CareerSource Pinellas, if possible). Include size of the government entity and the name, address and telephone number of a contact person currently available. Include specific corporations in which you have placed candidates at the level of Vice President or higher. Include the name, address and telephone number of a contact person currently available.
19. Describe any prior or pending litigation, either civil or criminal, which may affect the performance of the services to be rendered, in which the firm, any of its employees, subcontractors or sub-consultants is or has been involved within the last three (3) years. Include the nature, resolution and/or current status of the litigation.
20. What distinguishes your firm from your competitors?

B. Information about the Project:

1. Provide a narrative describing the Proposer's project plan, methodology (including recruitment strategy and affirmative action), and recommended solutions in performing the services described in this section and describe the specific policies, plans, procedures or techniques used in providing the services to be performed.
2. Provide an organization chart showing all individuals, including their titles, who would be assigned to this project.
 - a. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of all key individuals who would be assigned to this project. This information should include the functions to be performed by the key individuals.
 - b. Provide resumes and job descriptions and other detailed qualification information on all key personnel who will be assigned to this project. All key personnel include all partners, managers, seniors and other professional staff that will perform work and/or services on this project.

C. Timetable:

1. Provide a project schedule identifying specific key tasks and duration.
2. What progress reports would be made, in what format, and at what stages of the project?

D. Costs:

1. Describe the full fixed/basic fee and all associated reimbursable costs to conduct the specified services and to obtain a successful placement.
2. Is there a cap on reimbursable costs?
3. What are the projected travel expenses, if any?
4. Is your firm willing to provide additional services as needed at an hourly rate? If so, at what rates?
5. Guarantees:
 - a. Describe any guarantees and the nature of the guarantees that you are willing to make with regard to the quality of your work, including any guarantee relating to any early separation of the selected candidate.
 - b. Describe what happens if the Board of Directors is not satisfied with the slate of candidates presented to them or the BCC is not satisfied with the candidate recommended for approval by the Board of Directors?

Note: Public Records Law: Be advised that, after opening of proposals, all information and documentation submitted as part of, or in support of, proposals and all information and documentation submitted to the executive search firm in support of his or her candidacy, and any and all other documentation used by the executive search firm in connection with the services covered by this RFQ, will be available for public inspection and copying in accordance with Chapter 119 of the Florida Statutes, the Public Records Law. Florida's Sunshine Law requires that all meetings of the Board of Directors at which official acts are to be taken are declared to be public meetings open to the public at all times. This includes all interviews and discussions with the hired firm at which two or more members of the Board will be present.

Relationship Disclosure Form

This form must be completed by the Respondent. In the event any information provided on this form should change, the Respondent must file an amended form on or before the date the item is considered by CareerSource Pinellas.

Part I

INFORMATION ON RESPONDENT:

Legal Name of Respondent: _____

Business Address (Street/P.O. Box, City and Zip Code):

Business Phone () _____

Facsimile () _____

Part II

IS RESPONDENT A RELATIVE OF ANY CAREERSOURCE PINELLAS EMPLOYEE OR BOARD MEMBER?

___ YES ___ NO

IS ANY CAREERSOURCE EMPLOYEE OR BOARD MEMBER AN EMPLOYEE OF RESPONDENT?

___ YES ___ NO

IS RESPONDENT AN EMPLOYEE OF ANY CAREERSOURCE PINELLAS EMPLOYEE OR BOARD MEMBER?

___ YES ___ NO

IS RESPONDENT A BUSINESS ASSOCIATE OF ANY CAREERSOURCE PINELLAS EMPLOYEE OR BOARD MEMBER?

___ YES ___ NO

If you responded "YES" to any of the above questions, please state with whom and explain the relationship:

(Use additional sheets of paper if necessary)