

*Dallas County Local Workforce Development Board (dba) Workforce Solutions Greater Dallas is an equal opportunity employer.  Auxiliary aids are available upon request, for persons with disabilities. TTY:214-745-1054.  Funding received from the Texas Workforce Commission and originating with the U.S. Departments of Labor, Health & Human Services, Department of Children and Families, Education and Agriculture. 100% of costs paid will be from Federal Funds.*

**Edited on February 18, 2025**

**Request for Quotations (RFQ) for Executive Search Firm**

Workforce Solutions Greater Dallas (WFSDallas) is a non-profit/quasi-governmental organization that administers and acts as fiscal agent for several government resources specific to workforce services including education and childcare to assist employers and workers. Funds are consolidated at the local level and WFSDallas is responsible and accountable for the management of all workforce development funds made available to the local area. WFSDallas administers contracts and activities with a budget of approximately $180M annually. WFSDallas is a tax-exempt organization. Please see our website ([www.wfsdallas.com](http://www.wfsdallas.com)) to learn more about workforce programs, governance, the Board of Directors, and other pertinent information.

***Purpose***

Workforce Solutions Greater Dallas seeks a qualified **Executive Search Firm** that has experience in conducting executive personnel search services to fill a critical high-level executive position for agencies of similar size and scope.

**Scope of Services**

The executive search firm must provide the following services at a minimum, but not limited to:

1. Develop the ideal profile for the position by meeting with the Board Chair of WFSDallas and/or his designee to obtain information regarding specific elements, characteristics, experience, expertise, responsibilities, and professional attributes candidates should possess to be considered, including desirable education, certification, experience and background of the candidates, and identification of the management skills and style that are appropriate for this position.
2. Develop a strategy for implementing recruitment, including submission and name of various publications, both hard copy and electronic format, in which the position will be advertised, and identifying potential contacts through personal outreach to encourage applicants from diverse backgrounds to apply.
3. Screen/Review resumes for background and qualifications followed by telephone or in-person interviews (whichever is agreed to by WFSDallas) to clarify each applicant’s experience and credentials and to prepare a written summary of a maximum of ten candidates with the most promising qualifications.
4. Evaluate candidates for serious consideration by conducting in-depth reference checks with individuals who are or have been in the position to evaluate the candidates’ performance on the job. A short list of candidates of at least three shall be presented to the Board Chair and Search Committee.

In the event politically sensitive or potentially embarrassing issues arise in the candidates’ background, the firm will conduct thorough interviews with principal parties to clarify the issue and clearly describe a picture of the issue and help WFSDallas determine whether to keep the candidate in contention.

1. Recommend and finalize a process with the Board Chair and Search Committee for interviews and coordinating candidates’ participation in interviews.
2. Debrief the Board Chair and Search Committee following interviews and identify additional candidates, if necessary.
3. Verify selected candidates educational and employment background, financial/credit, newspaper research, internet search and coordinating criminal and civil litigation checks.
4. Assist the Board Chair and Search Committee in structuring the job offer, the employment package and relocation (if applicable) with the finalist.
5. Provide the Board Chair and Search Committee with regular written status reports and keeping candidates apprised of their status.
6. Conduct a minimum of five (5) meetings with the Board Chair/Search Committee which may include, but not limited to the following: (a) one (1) meeting individually to develop the candidate profile, (b) one group meeting with the Search Committee , (c) one (1) group meeting with the Board Chair/Committee to present the candidate’s profiles and recruitment brochures, (d) one (1) group meeting with the Search Committee and other key stakeholders potentially with Board Chair, and Board Attorney, and (e) one (1) group meeting with the Search Committee and, and potentially with the Board Chair and Board Attorney to facilitate interviews with the finalists.
7. Provide the proposer’s experience and approach to successfully conducting searches and recruiting high-level candidates.
8. Provide within the proposal, five references for which the search firm successfully conducted a search, collaborated with elected officials or board, and/or high-ranking executives making hiring decisions.
9. Provide the structure and resume of the representative(s) leading the search/recruitment.
10. Vendor will create and deliver memorandum outlining the search entity’s proposed timeline, which shall include a final candidate pool within 90 days from contract execution. As part of the proposer’s approach, the proposer must also include the below as a minimum:
	* Conduct recruitment through advertisements, publications, social media, professional associations, and other available means.
	* Conduct initial screening and recommendation of at least three qualified candidates.
	* Develop informational packets on all recommended candidates, including at a minimum: a candidate summary, detailed resume, and comprehensive references.
	* Communicate, distribute, and receive all application materials.
	* Conduct reference, background, and education checks on candidate(s) recommended for consideration.
	* Coordinate interview panels and assists with the development of interview questions for final candidate interviews.
	* Initial interviews may be conducted virtually unless WFSDallas requests otherwise.
	* Assist with interviews and the selection process.
	* Assist with negotiation of conditions of employment and notify rejected applicants of outcome within five (5) days of conclusion of the final candidate selection process.
	* Answer written correspondence from WFSDallas within two (2) business days; and respond to phone messages and e-mail communications within two (2) hours. This requirement can be waived by WFSDallas on a case-by-case basis.
	* Final candidate selection and start date will be determined by the Board Chair.
11. WFSDallas will pay for costs related to travel and lodging for interviews if reasonable, necessary, and deemed appropriate, in accordance with state and federal travel rules. The selected proposer will pay for all other recruiting costs associated with the search including travel and lodging costs for their employees.
12. If the selected candidate for which the firm is paid a commission and leaves for any reason during the first year of employment, the entity shall propose a fee structure for another round of candidates if necessary.

***Eligible Bidders***

Vendors with the capability to provide services as described within the RFQ, with a record of integrity and good business ethics (i.e., not debarred from doing business with state, federal or local government), and able to meet the technical specifications for quality and other terms of this RFQ, and location(s) within the Greater Dallas workforce area or surrounding Metroplex, are invited to respond.

Vendor selection will be via small purchase method of procurement (as described in the TWC Financial Manual for Grants and Contracts) based on the price, qualifications, and the ability to accommodate the needs of WFSDallas.

***Procurement Process and Timeframe for Submission***

The information requested must be emailed to procurement@wfsdallas.com If you have any questions regarding this RFQ, please address them to the email link at procurement@wfsdallas.com. **Re-issued date of February 18, 2025, at 4:00 p.m. CST,** with a **due date of February 21, 2025, by 12:00 p.m., CST**.

## Open Records and Public Disclosure of Proposal Information

## This is a negotiated procurement utilizing the request for quotations (RFQ) method, and as such, the selection of vendors does not have to be made to the respondent(s) submitting the lowest price, but rather to the respondent(s) submitting the most responsive quotations that satisfies the requirements and is determined to be in the best interest of the Board.

Workforce Solutions Greater Dallas is a State of Texas certified Local Workforce Development Board. Proposals submitted will not be returned and are subject to the Texas Public Information Act located in Chapter 552 of the Texas Government Code (the “PIA”) and may be disclosed to the public upon request. Subject to the PIA, proposers may protect trade secret, proprietary and confidential information from public release. If a proposer does not desire proprietary or confidential information in its proposal to be disclosed, proposer is required to identify all proprietary or confidential information in its proposal. This identification must be done by individually marking each page with the words "Confidential Information" on which such proprietary or confidential information is found. If the proposer fails to identify confidential information, proposer agrees that, by submission of its proposal, those sections shall be deemed non-confidential and made available in response to any public request.

Proposers are advised that Workforce Solutions Greater Dallas, to the extent permitted by law, will protect the confidentiality of submitted proposals. However, proposers shall consider the implications of the PIA, particularly after the request for proposals process has ceased and the contract award has occurred. While provisions in the PIA may apply to protect confidential information, proposers are further advised that a determination on whether those standards have been met will not be made by Workforce Solutions Greater Dallas but must be decided by the Office of the Attorney General of the State of Texas. In the event a request for public information is made, Workforce Solutions Greater Dallas will notify the proposer and the proposer may then request an opinion from the Attorney General pursuant to Section 552.305 of the Texas Government Code. Workforce Solutions Greater Dallas will not make a request for an opinion from the Texas Attorney General. Copyrighted proposals are unacceptable and are subject to disqualification as non-responsive.

***Governing Provisions and Limitations***

1. The main purpose of this RFQ is to ensure uniform information in the solicitation of proposals and procurement. This RFQ does not commit the WFSDallas to pay for costs incurred in the preparation of a response, or any other costs incurred prior to the execution of a formal agreement, unless such costs are specifically authorized in writing by WFSDallas.
2. WFSDallas reserves the right to accept or reject any or all proposals received, to cancel and/or reissue this RFQ in part or its entirety.
3. WFSDallas reserves the right to correct any error(s) and/or make changes to this solicitation as it deems necessary.
4. All Board Directors, officers, and staff, or any agents of the Board are precluded from entertaining questions concerning the proposal or this procurement process outside the confines of the formal Questions and Answers process. Potential respondents, respondents and current provider of services are asked to respect these conditions by not making personal requests for assistance. No employee, member of a Board of Directors or other governing body, or representative of a respondent who submits a proposal under this RFQ may have any contact outside of the formal review process with any employee of WFSDallas, or any member of the Board of Directors for purposes of discussing or lobbying on behalf of respondent’s proposal. This contact includes written correspondence, telephone calls, personal meetings, e-mail messages, or other kinds of personal contact. WFSDallas will reject proposals of those respondents who violate this condition.
5. WFSDallas reserves the right to contact any individual, agency employer, or grantees listed in a proposal, to contact others who may have experience and/or knowledge of the respondent’s relevant performance and/or qualifications; and to request additional information from any respondents.
6. Respondents shall not under penalty of law, offer or provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of the Board, for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder.
7. No Board Director, officer, or employee, or any agent of the Board shall participate in the selection, award or administration of a contract supported by Board funds if a conflict of interest, real or apparent, would be involved.
8. Respondents shall not engage in any activity, which will restrict or eliminate competition. Violation of this provision may cause a respondent to be disqualified.
9. WFSDallas reserves the right to deem a proposal non-responsive or disqualify any proposal that, in its sole determination, does not comply with or conform to the terms, conditions, and/or requirements of this RFQ.

***Proposal Evaluation Process***

Proposals will be evaluated by members of the Search Committee. Proposals that do not confirm to the instructions or do not address the services as specified may be eliminated from consideration. Parts of the scoring are scored independently by each reader; the final scores for those parts will be the average of the independent scores of all readers. For the final decision, WFSDallas reserves the right to depart from the strict ranking by evaluation scores, whenever it deems such departure will better serve the best interests of WFSDallas and its constituents. Proposals will be evaluated based on the information provided, requirements as stated in this solicitation document and the evaluation criteria as follows:

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| **Criteria** | **Points** |
| Approach  | 45 |
| Experience  | 40 |
| Cost  | 15 |
| **Total** | **100** |

The total fee for this executive search shall be all inclusive and shall be valid for term of the contract. All necessary expenses shall be included in the proposal and in the total pricing, including but not limited to advertising, recruitment, printing, background checks, postage, and all travel expenses for search firm employees should be listed in the proposal.

Costs not included or calculated in the applicable unit prices as proposed will not be paid by WFSDallas, regardless of the intentions of the proposerwhen the proposal was submitted and regardless that those costs were actually incurred.

***Proposer Inquiry and Appeal Process***

1. The Dallas County Local Workforce Development Board, Inc. dba Workforce Solutions Greater Dallas is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process. Please see [TWC\_Financial\_Manual\_Grant\_Contracts\_Procurement](https://www.twc.texas.gov/sites/default/files/finance/docs/financial-manual-for-grants-and-contracts-appd-procurement-supplement-twc.docx)

2. Respondents not selected by this process may appeal the decision by submitting, within 10 days of the Board notification of the procurement decision, a written request for debriefing to obtain information on the procurement process and how their proposal or offer was received and ranked. The Board shall acknowledge receipt of the Request for Debriefing in writing within 10 days of receipt, along with the date and time of the scheduled briefing. (NOTE: The Board extends the courtesy of offering a briefing to any respondent who is not selected for funding; the 10-day time frame must be adhered to only if a respondent is considering an appeal.) A copy of the complete appeal process will be provided upon request.

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# **PROPOSAL SUBMISSION FORMS**

Please complete and submit the following information. If additional pages or brochures are needed, please submit with your completed proposal.

# RFQ Executive Search Firm

### 1. Contact Information

1.1 Organization Name submitting the Proposal:

1.2 Name and Title of Representative Completing the Proposal:

1.3 E-mail address of Representative:

1.4 Telephone Number of Representative:

1.5 Name and Title of Designated Contact for the Organization:

1.6 E-Mail of Designated Contact:

1.7 Telephone Number of the Designated Contact:

1.8 Type of Organization      Date Established

1.9 Federal EIN      Texas State Comptroller ID #

2. Approach 45 points

* Briefly state your entity’s understanding of the work to be done and provide a positive commitment to perform the work.
* Give the names of persons who will be authorized to make representations for your services, titles, addresses, and telephone numbers.
* Describe your approach to performing the contracted work. This should include type of services provided – discuss your role and that of other parties involved in conducting interviews and coordinating applicant’s participation in interviews and discuss your project plan for this engagement outlying major tasks and responsibilities, time frames and staff assigned.
* Providea detailed time schedule for this project.

**3. Experience 40 points**

* Identify the project manager(s) and each individual who will work as part of the engagement.  Include resumes for each person to be assigned.  The resumes may be included as an appendix.
* Describe the experience in conducting similar projects assigned to the engagement.  Describe the relevant educational background of each individual.
* Describe the organization of the proposed project team(s), detailing the level of involvement, field of expertise and estimated hours for each member of the team(s).
* Describe what staff support you anticipate for the project.
	1. Demonstrate full familiarity of the requirements of the laws of the State of Texas.
* State whether your organization is national, regional, or local.
* State the location of the office from which your work is to be performed.
* Describe the entity including the size, range of activities, etc.  Emphasis should be given as to how the firm -wide experience and expertise in the areas addressed by this RFQ will be brought to bear on the proposed work.
* Provide a list of description of similar organization satisfactorily performed within the past five (5) years.  For each engagement listed, include the name and telephone number of representatives for whom the engagement was undertaken who can verify satisfactory performance.
* Provide information involving litigation within the past five (5) years or any pending litigation arising out of your performance.

4. Cost 15 Points

Please provide a fee schedule including a full break-down of all costs. Including a total estimated hours required to complete proposed work, as well as hourly rates of individual team members dedicated to the project. Express your administrative fee in a lump sum not-to-exceed amount and a separate price for travel and related expenses. Additionally, indicate your expectations concerning reimbursement for travel, per diem expenses, photocopying, phone charges or other incidental expenses for you and separately for the candidates.  If additional work is required beyond the scope of this contract, how would those services be billed?  This may include additional presentations or follow-ups as requested.

### 5. Authorized Signature

I certify that the information contained in this quotation/proposal, and any attachments are true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee of the Board, director or agent of the Board has assisted in the preparation of this proposal. I acknowledge that I have read and understood the requirements and provisions of the RFQ, and that this organization will comply with Board policies and other applicable local, state, and federal regulations and directives governing this procurement process. I also certify that I have read and understand and will comply with the RFQ terms; and furthermore, that I am authorized to sign this bid and submit it to the Dallas County Local Workforce Development Board, Inc. on behalf of my organization by authority of its governing body or owners. I authorize the Board to verify references and applicable data to conduct background checks, as necessary.

I have also reviewed and certify that my organization has not been debarred in accordance with Federal Regulations, implementing Executive Order 12549, Government-wide Debarment and Suspension, for the Department of Agriculture (2 C.F.R. Part 417), Department of Labor (2 C.F.R. Part 2998), Department of Education (2 C.F.R. Part 3485), and the Department of Health and Human Services (2 C.F.R. Part 376). I certify that neither my organization nor its principals:

1. Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or Agency.
2. Have, within a three-year period preceding this bid, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or grant award under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses;
4. Have had, within a three-year period preceding this bid, one or more public transactions terminated for cause or default,
5. Barred from participating in State contracts pursuant to Texas Government Code § 2155.077, as implemented by 34 TAC §§ 20.105 – 20.107; <https://comptroller.texas.gov/purchasing/programs/vendor-performance-tracking/debarred-vendors.php>; and
6. Barred from federal level using the U.S. General Service Administration’s System for Award Management (SAM) Exclusion Search Web Service (formerly the Excluded Parties List System or EPLS) accessible at <http://sam.gov>.

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|  **Print/Type Authorized Representative Print/Type Authorized Representative Title** **Authorized Representative Signature Date** |