

WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)

REQUEST FOR PROPOSALS (RFP) for

**Title I Career Services
for
Adults and Dislocated Workers**

**Release Date:
March 1, 2016**

**Proposal Deadline:
April 8, 2016**

**Contract Period:
July 1, 2016 to June 30, 2017**

**Contact Information:
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Section I. Introduction and Key Provisions

The Regional Workforce Development Board (RWDB), serving *Mitchell, Worth, Winnebago, Hancock, Cerro Gordo, Floyd and Franklin* counties in Iowa, is seeking proposals from eligible organizations to provide *Title I Career Services for Adults and Dislocated Workers*.

The RWDB is committed to a system that provides excellent customer services. The RWDB desires Service providers capable of providing a seamless system of services built on a “Service Integration” model that offers a variety of activities to better align, organize and optimize workforce service delivery and outcomes, creating one common customer path with a standardized process for a wide range of services.

A. Title I Career Services for Adults and Dislocated Workers Solicited under this RFP:

As the administrative entity and prime recipient, the Regional Workforce Development Board is seeking a Service Provider (public, private, or nonprofit) to provide and coordinate the Title I Career Services for Adults and Dislocated Workers.

Funds shall be used to provide basic career services, which shall be available to individuals through the one-stop delivery system and shall, at a minimum, include the following:

- determinations of whether the individuals are eligible to receive assistance under this subtitle;
- outreach, intake (which may include worker profiling), and orientation to the information and other services available through the one-stop delivery system;
- initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs;
- labor exchange services, including –
 - job search and placement assistance and, in appropriate cases, career counseling, including –
 - provision of information on in-demand industry sectors and occupations; and
 - provision of information on nontraditional employment; and
 - job placement and job development services for job seekers;
- provision of referrals to and coordination of activities with other programs and services, including programs and services with the one-stop delivery system, and, in appropriate cases, other workforce development programs;
- provision of workforce and labor market employment statistics information;
- provision of performance information and program cost information on eligible providers of training services;
- referrals to services and assistance; and
- assistance in establishing eligibility for program of financial aid assistance for training and education programs that are not funded under WIOA.

Individualized Career Services, if determined to be appropriate in order for an individual to obtain or retain employment are provided to eligible adults and dislocated workers and include the following:

- Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include
 - Diagnostic testing and use of other assessment tools; and
 - In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.

- Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the employment goals, including providing information on eligible providers of training services, and career pathways to attain career objectives;
- Individual and Group counseling;
- Career planning;
- Short-term prevocational services, including development of learning skills, workplace readiness skills to prepare individuals for unsubsidized employment or training;
- Internships and work experiences that are linked to careers;
- On-the-Job Training (OJT);
- Workforce preparation activities;
- Financial literacy services;
- Out-of-area job search assistance and relocation assistance;
- English language acquisition and integrated education and training programs;
- Referrals to:
 - Adult Basic Education and High School Equivalency (HSE) preparation activities, as applicable
 - Occupational Training (Eligible Training Providers and Programs);
- On-going Case Management and Coaching;
- Unsubsidized Job Development and Placement Assistance—coordinated with The Business Services Team;
- Management of records, including case notes;
- Management of data related to WIOA Performance Goals; and
- Follow-up services, including counseling regarding the workplace, for participants in workforce development activities, placed in unsubsidized employment, for not less than 12 months after the first day of employment, as appropriate.

NOTE: Trade Act services are integrated with Dislocated Worker services. All Trade Act customers are co-enrolled into the Dislocated Worker services. The successful proposer will be expected to continue Workforce Investment Act (WIA) identified and WIOA identified services for adults and dislocated workers currently enrolled and in follow-up services, in accordance with guidance expected from the U.S. Department of Labor and Iowa Workforce Development. The successful proposer will also work closely with the Iowa Workforce Development to deliver Rapid Response services.

B. Service Model

The provider(s) selected under this Request for Proposal will be expected to continue to develop and enhance our workforce development system by focusing on a fully coordinated and integrated customer service strategy, focused on a “single-point of contact” model that is market driven and offers value-added services to our job seeker and employer customers. The focus of services, Basic Career Services and specific program services, will be driven by four (4) key points:

1. Provision of exceptional customer service;
2. Capacity to meet the needs of business and workers;
3. Ability to provide seamless and accessible services; and
4. Accountability.

C. The Service Integration Model

The model for Title I Career Services for Adults and Dislocated Workers is an integrated service model. This model requires integration of the Customer Pool – people coming in the doors are “our” shared

customers. There is an integrated customer flow, a standardized common service flow for customers. There are integrated customer service teams that support the customer flow, with staff from different programs working together to complete the work of the team. Services and staff resources will not be separated and in siloes by funding stream or program. Functional teams of staff members from multiple organizations are expected to work as a “unit” with functional supervision.

D. Eligible Bidders

Organizations or entities (public, private, or nonprofit) with demonstrated effectiveness which may include:

- An institution of higher education;
- An employment service state agency established under the Wagner-Peyser Act (29 U.S.C. 49 et seq.), on behalf of the local office of the agency;
- A community-based organization, nonprofit organization, or intermediary;
- A private for-profit entity;
- A government agency; and
- Another interested organization or entity, which may include a local chamber of commerce or other business organization, or a labor organization

E. Funding Availability

The last 2 years of budgets are indicated below to assist in budget development. The Regional Workforce Investment Board does not guarantee this figure as an accurate projection of annual funding available for Region 2 during the term of the contract. All amounts are estimates for planning purposes and subject to change.

	Budget FY15	Budget FY16
WIOA Administration	\$ 30,234	\$ 31,361
WIOA Adult Program	\$ 135,881	\$ 137,806
Dislocated Worker Program	\$ 136,241	\$ 144,444
TOTAL	\$ 302,356	\$ 313,611

Administrative Costs, as identified in the Workforce Investment Act and Workforce Innovation and Opportunity Act, are limited to 10% and must be clearly identified and defined in the Budget and Budget Narrative. (Budget and Budget Narrative template is provided in (Appendix B/C)

F. Right to Cancel

The RWDB reserves the right to delay, amend, reissue, or cancel, all or any part of this RFP at any time without prior notice. RWDB also reserves the right to modify the RFP process and timeline as deemed necessary. Subject to guidance being issued by US Department of Labor and/or Iowa Workforce Development and the issuance of final regulations this RFP and/or any subsequent sub-awards will be modified to ensure compliance.

G. Management and Financial Requirements and Separation of Duties

1. Management

- a. Proposers must be able to demonstrate the management and financial capability needed to effectively and efficiently deliver the program proposed. Management capability includes:
 - i. the ability to manage the delivery system effectively and efficiently,
 - ii. conduct self-monitoring for contract compliance,
 - iii. implement a continuous improvement model,
 - iv. achieve the contract objectives,
 - v. provide quality service delivery,
 - vi. keep appropriate records in an auditable manner, and
 - vii. meet/exceed performance standards.

2. Financial Requirements

- a. Proposers must be able to:
 - i. maintain fiscal controls,
 - ii. implement and adhere to accounting procedures;
 - iii. prepare and provide financial reporting in accordance with generally accepted accounting principles,
 - iv. demonstrate sound financial practices, and
 - v. show evidence of continued financial stability.

3. Records

- a. The successful proposer will maintain separate accounting records for any contract resulting from this RFP to ensure accurate and appropriate reporting of contract expenditure, and ensure that costs are tracked in sufficient detail to determine compliance with contract requirements and ensure funds have not been unlawfully spent.
- b. All accounting records must be made available for review upon request for examination, audit, or for the making of excerpts or copies of such record for the purpose of determining compliance with all applicable rules and regulations, and the provisions of the contracts.

4. Separation of Duties

- a. A separation of duties (administrative, fiscal, programmatic oversight and training services separated from direct program service delivery) is required to be identified to eliminate and avoid any conflict of interest or perceived conflict of interest and to allow for appropriate quality checks and balances.

H. Indirect Cost Rate

Indirect costs are allowed if the entity has an approved indirect cost rate. However, these rates are subject to negotiation but may not exceed the approved indirect cost rate.

I. Cost and Prices Analysis

All proposals will be evaluated on the basis of obtaining the most cost-effective price possible while achieving the highest quality service delivery. A cost price analysis will be conducted on the proposed costs during the proposal review process. Agencies are encouraged to submit their best offer for providing the services solicited and to thoroughly describe and justify the costs.

The cost and price analysis shall be conducted to ensure that the proposed costs are necessary, fair, and reasonable; to determine if the proposed costs are allowable and allocable; to determine if there is a duplication of costs with other programs; to ensure that the costs are directly associated with carrying out only the proposed services; and to ensure that the proposed costs will benefit the program.

J. Audit Requirements

The services delivered under this RFP are considered sub-recipient services and will require the selected proposer to comply with audit requirements for federal funds. All Service Providers must submit a copy of its most recent independent audit and financial statement.

K. Type of Contract

Proposed costs will be analyzed and a cost reimbursement contract will be negotiated with a demonstrated performance basis. Payment under a cost reimbursement contract will be based upon actual costs and performance delivery outcomes. All contracts will be executed with Iowa Workforce Development on behalf of the RWDB.

For the purposes of responding to this RFP, proposers will develop a line-item budget showing all expected costs associated with delivering the proposed services and a budget narrative explaining the costs.

L. Outreach, Public Relations, and Branding

Services offered through The One-Stop System partnership (and funded by WIOA) shall be promoted under “IowaWORKS” brand and the “federal identifier”, *partner in the American Job Centers Network*. In keeping with our vision of offering integrated services to both jobseekers and employers, promotional and outreach materials (including printed brochures, media releases, flyers, brochures, advertising, social media sites) must only include IowaWORKS branding and the American Job Center identification. All promotional and outreach materials will be approved by the IWD Communications Director. The IWD Communications Director will ensure all stationary, brochures, signage, business cards, and advertising meets the branding requirements of the Workforce Innovation and Opportunity Act and the Iowa Workforce Development guidelines.

M. Questions/Restrictions on Communication

Any questions regarding this RFP should be addressed only to the Issuing Officer. All questions must be submitted via email no later than 12:00 Noon, Tuesday, March 15, 2016 to Marla Loecke, marla.loecke@iwd.iowa.gov . Questions will be responded to in writing and posted on the regional website. This website can be accessed at: www.iowawdb.gov

SECTION II. PROCUREMENT TIMETABLE

Procurement Action	Date
Issue RFP	Tuesday, March 1, 2016
Deadline for All Questions	Tuesday, March 15, 2016
Questions posted to the Website	Friday, March 18, 2016
Proposals Due	Friday, April 8, 2016 4:00 PM
Proposal Reviews	April 15, 2016
Possible Proposal Presentations, If Applicable	April 25, 2016
Board and Elected Official Action to Award	May 6, 2016
Sub-Award/Agreement Executed	June 3, 2016
Period of Performance	July 1, 2016 – June 30, 2017

All times shown are Central Standard Time (CST). The RWDB reserves the right to adjust the schedule when it is in the best interest of the Board or to extend any published deadline in this RFP. The Proposal and all required attachments must be received at the RWDB Administrative office by the dates and times shown above. The prospective proposer is solely responsible for assuring that anything sent to RWDB arrives safely and on time.

Proprietary rights to all data, materials, and documentation originated and prepared for the RWDB pursuant to a sub-award shall belong exclusively to the RWDB.

All proposals submitted will be subject to competitive review. Proposal funding decisions will be made by the Regional Workforce Development Board upon recommendation of the Proposal Review Panel.

The funding period for sub-awards under this solicitation will be July 1, 2016 through June 30, 2017 provided performance remains acceptable during that period. Any contract awarded from this RFP will include an option to renew for up to three additional one year periods, contingent upon successful performance.

SECTION III. BACKGROUND INFORMATION AND WIOA REFERENCES

Workforce Innovation and Opportunity Act (WIOA) References:

SEC. 134 USE OF FUNDS FOR EMPLOYMENT AND TRAINING ACTIVITIES. (c)(2) CAREER SERVICES:

- (A) **SERVICES PROVIDED.** – Funds described in paragraph (1) shall be used to provide career services, which shall be available to individuals who are adults or dislocated workers through the one-stop delivery system and shall, at a minimum, include-
- (i) determinations of whether the individuals are eligible to receive assistance under this subtitle;
 - (ii) outreach, intake (which may include worker profiling), and orientation to the information and other services available through the one-stop delivery system;
 - (iii) initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs;
 - (iv) labor exchange services, including –
 - (I) job search and placement assistance and inappropriate cases, career counseling, including –
 - (aa) provision of information on in-demand industry sectors and occupations; and
 - (bb) provision of information on nontraditional employment; and
 - (II) appropriate recruitment and other business services on behalf of employers, including small employers, in the local area, which services may include services described in this subsection, such as providing information and referral to specialized business services not traditionally offered through the one-stop delivery system;
 - (v) provision of referrals to and coordination of activities with other programs and services, including programs and services with the one-stop delivery system, and , in appropriate cases, other workforce development programs;
 - (vi) provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including-
 - (I) job vacancy listings in such labor market areas;
 - (II) information on job skills necessary to obtain the jobs describe in sub clause (I); and
 - (III) information relating to local occupations in demand and the earnings, skill requirements and opportunities for advancement for such occupations; and:
 - (vii) provision of performance information and program cost information on eligible providers of training services as described in section 122, provided by program, and eligible providers of youth workforce investment activities as described in section 123, providers of adult education described in title II, providers of career and technical education activities at the postsecondary level, and career and technical education activities available to school dropouts, under the Carl D. Perkins Career and Technical Education Act of 2006 (20 U.S.C. 2301 et seq.), and providers of vocational rehabilitation services described in title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.);
 - (viii) provision of information, in formats that are usable by and understandable to one-stop center customers, regarding how the local area is performing on the local performance accountability measures described in section 116(c) and any additional performance information with respect to the one-stop delivery system in the local area;
 - (ix) (I) provisions of information, in formats that are useable by and understandable to one-stop center customers relating to the availability of supportive services or assistance, including child care, child support, medical or child health assistance under title XIX or XXI of the Social Security Act (42 U.S.C. 1396 et seq. and 1397 aa et seq.), benefits under the supplemental nutrition assistance program established under the Food and Nutrition Act of 2008 (7 U.S.C. 2011 et seq.),

assistance through the earned income tax credit under section 32 of the Internal Revenue Code of 1986, and assistance under a State program for temporary assistance for needy families funded under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.) and other supportive services and transportation provided through funds made available under such part, available in the local area; and (II) referral to the services or assistance described in subclause (I), as appropriate;

- (x) Provision of information and assistance regarding filing claims for unemployment compensations;
- (xi) Assistance in establishing eligibility for programs of financial aid assistance for training and education programs that are not funded under this ACT;
- (xii) Services, if determined to be appropriate in order for an individual to obtain or retain employment that consist of –
 - Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include
 - (aa) Diagnostic testing and use of other assessment tools; and
 - (bb) In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals
 - Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the employment goals, including providing information on eligible providers of training services pursuant to paragraph (3)(F)(ii), and career pathways to attain career objectives;
 - Group counseling;
 - Individual counseling;
 - Career planning;
 - Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare individuals for unsubsidized employment or training;
 - Internships and work experiences that are linked to careers;
 - Workforce preparation activities;
 - Financial literacy services, such as the activities described in section 129(b)(2)(D);
 - Out-of-area job search assistance and relocation assistance; or
 - English language acquisition and integrated education and training programs; and
- (xiii) Follow-up services, including counseling regarding the workplace, for participants in workforce investment activities authorized under this subtitle who are placed in unsubsidized employment, for not less than 12 months after the first day of employment, as appropriate.

SECTION IV. SPECIFICATIONS

A. Expectations

The successful bidder shall demonstrate:

- proven experience working with individuals with barriers to employment;
- a history of documented financial stability;
- proven management expertise;
- a Board of Directors (or comparable body) that will be free of conflicts and will exercise active oversight of--
 - program management, audits, and financial controls, and
 - program operation and outcomes;
- a history of engaging in successful joint efforts with other organizations providing the same or similar services;
- the capacity to integrate the service model/design into its overall operations;
- an internal monitoring system that will effectively identify program, personnel, and fiscal issues and provide corrective action procedures;
- the ability to meet the required hours of operation and State government holiday schedule; and
- a continuous quality improvement process that includes quality assurance measures for all aspects of the services.

B. Experience and Qualifications of the Bidder and the Bidder's Staff

- Bidders are expected to indicate if other sources of funding will also support the services.
- The bidder, if successful, will employ qualified staff with the credentials, skills and knowledge to deliver the services identified in this RFP.
- The successful bidder will ensure that WIOA paid staff members are appropriately trained in areas including, but not limited to: Eligibility and Intake, Customer Service, Case Management, Career Planning, and Employment Planning.
- All staff will provide services in a manner sensitive to the ethnic, racial, and linguistic characteristics; religious preferences; and sexual orientation of the customer.

C. Scope of Services to be Provided

Vision for WIOA Programming: The vision for a revitalized transformed workforce system under WIOA is provided in Training and Employment Guidance Letter No. 19-14 issued by U.S.DOL, Employment and Training Administration on February 19, 2015.

The workforce system will be characterized by three hallmarks of excellence:

- The needs of business and workers drive workforce solutions;
- One-Stop Centers provide excellent customer service to job seekers and employers and focus on continuous improvement; and
- The workforce system supports strong regional economies and plays an active role in community and workforce development.

Key operational principles include:

- Alignment of programs and integrated services;

- High quality services;
- Accountability and transparency; and
- Data-driven decisions for informed customer choices.

It is the goal of this system that the delivery of services will be focused on fully integrating a consistent service delivery process, the core of which is a "Service Integration" model, providing exceptional customer service, quality career planning and case management, and effective job placement to impact the long-term success of all customers.

The proposer contracted in response to this RFP must provide the services described in this RFP to the following customers, as appropriate and within funding/eligibility guidelines and requirements:

- Veterans
- Adult learners and workers with basic skills deficiency or lacking a high school credential
- TANF recipients
- Dislocated Workers
- The general public seeking career services
- Re-Entry/Returning Citizens (Ex-Offenders)
- Individuals facing English language barriers
- Other targeted populations as determined by the Department of Labor (DOL) or IWD

WIOA Title I Career Services for Adult and Dislocated Workers

1. Outreach and Recruitment

Implement an outreach strategy to enroll adults and dislocated workers in WIOA services and to meet performance standards. Manage enrollment of adult and dislocated workers into WIOA services to maximize funding allocations.

2. WIOA Registration/Enrollment

- In accordance with appropriate federal and state guidance, make eligibility determinations and enrollments into the appropriate program services. Collect and maintain documentation as required.
- Obtain the services information and data elements to appropriately document and report activities.
- With the customer, jointly develop Employment Plans, identify service strategies from intake through job retention.
- Document barriers to employment and clearly identify services provided to address individual circumstances.
- Provide quality case management with complete case note documentation.
- Provide follow-up services as appropriate for WIOA customers for up to 12 months after program exit.

3. Career Services

Develop and provide on-site access to all career services for customers:

- Utilize a variety of resources, assessments and career exploration tools available.
- Designate, hire or establish an assessment specialist or team of assessment staff trained to conduct vocational interest assessments, NCRC employability assessments and other assessments to assist Career Advisors/Employment Specialists and customers determine opportunities for job placement and training success.
- Full development of individual employment plans, updating them as circumstances change and activities are completed. Individual employment plans should, at a minimum, include specific program services the customer will receive; job search assistance available; supportive services needed; income planning (while participating in program services and income needed to become self-sufficient at employment); and benchmarks to accomplish the employment goal.
- Individual and Group career counseling and career planning.
- Short-term pre-vocational services.
- Short-term job search activities: career counseling, job search skills brush up, assisted job search, supportive services and workshops.
- For customers entering employment, provide follow up services to support retention.
- Assessment for suitability for vocational training. Administer a financial assessment to identify training funding options for eligible customers.
- Case management for customers, contacting them regularly (a minimum of every thirty (30) days depending on need), reassessing them, and providing needed career services.
- Reassessment and other services for customers having difficulty making progress on career goals, experiencing barriers preventing full participation in services, or difficulties on completion of planned activities.

4. Training Services

- To obtain training services to attain employment, customers will complete an in-depth assessment, and as a result, the Individual Employment Plan (IEP) will document the need for training and that the customer has inadequate access to resources to cover the cost of training.
- Training services will be available to customers who have demonstrated this inability to attain self-sufficiency and who are interested in and capable of obtaining training and employment in in-demand occupations identified by the board for the region.
- Provide a streamlined process that will enable customers to access relevant training for approved training vendors.
- Implement special training programs as identified with partner programs to address specific employment areas.
- Make sure the customers have:
 - Been adequately informed about the current labor market;
 - Identified his/her skills and employability strengths and gaps;
 - Identified a job training program for their expressed vocational interest and skills needs;
 - Selected and agreed to enroll in training directly linked to a job that allows them to attain a self-sufficiency wage in an in-demand industry sector for this region;
 - The skills/qualifications to successfully complete the training and obtain a job;

- Been determined to be a dislocated worker, or an adult as defined by WIOA regulations; and
 - Determined that there is no other grant assistance or insufficient grants to pay for all the costs for training delivered through an Eligible Training Provider.
- Carry out the policies of the RWDB regarding training (Individual Training Accounts; Pre-Vocational Services; Work-Based Learning options; Industry Sectors; Assessments; IEP).
- Use eligible training vendors for Individual Training accounts (ITAs) to provide customers with suitable vocational and occupational skills training options. Refer all customers to training paid for with WIOA funds to vendors on the eligible training providers list, unless offered on-the-job training or customized training.
- Provide access to the following Training Services:
 - On-the-Job Training – Training by an employer that is provided to a paid participant while engaged in productive work that:
 1. Provides knowledge or skills essential to the full and adequate performance of the job;
 2. Provides reimbursement to the employer of a percentage of the wage rate (generally 50%;) of the participant for the extraordinary costs of providing the training, and additional supervision related to the training.
 3. Is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, prior work experience of the participant, and the service strategy of the participant, but not exceeding six months.
 - Customized Training – Training that is designed to meet the special requirements of an employer or group of employers; conducted with employer commitment to employ, or in the case of incumbent workers, continue to employ an individual upon successful completion of training, for which the employer(s) pays in accordance with Board policy based on the size of the company employment schedule.
 - Occupational Skills Training – Training by eligible training providers and supported all or in part by an Individual Training Account.
 - Registered Apprenticeship
- Monitor the progress of WIOA customers enrolled in training through contacts with training customers and training vendors. Document progress of WIOA training customers on an ongoing basis.
- Obtain copies of credentials and training certificates customers receive as documentation of completion of training services.
- Work with IWD to collect information on the effectiveness of training programs.
- Focus resources and customers on the industries and skills in which employers offer high demand, high skills, and high wage jobs for customers successfully graduating from the training program.

5. Rapid Response

- Participate with the State in the provision of Rapid Response services.
- Leverage and coordinate community and public resources for lay-offs, including linking to One-Stop partners and Trade Act programs and promote seamless delivery of services to affected businesses and employees.
- Implement a strategy for promoting Rapid Response so that everyone involved in dislocation events is aware and takes full advantage of the full range of available re-employment services.

- Respond to all rapid response requests within the times and process designated by IWD Rapid Response procedures and policy.
- Provide services in locations and times convenient for affected workers.

6. Post-Employment Services

- Provide retention and re-employment services that ensure the ultimate retention and advancement of customers at a self-sufficient wage.
- Identify other barriers that could affect job retention and amend IEP by mapping out action steps to address potential pitfalls.
- Be knowledgeable about the impact of follow-up activities on performance and fulfill all follow-up requirements to secure results.

7. Tracking WIOA Customers and Reporting on Progress and Outcomes

- Complete all required WIOA customer paperwork and enter customer information into IWORKS or any subsequent system provided upon receipt of service.
- Participate fully in training on WIOA data management, eligibility determination, and accurate and timely data entry.
- Establish procedures for accurate completion and review of WIOA paperwork and timely entry of data into the IWORKS system. This includes:
 - Customer applications document of eligibility;
 - Documentation of ending “activity”;
 - Employment verifications;
 - Documentation of exiting customers; and
 - Documentation of customer follow-up.
- Accurately determine eligibility and suitability for WIOA services for program participants.
- Manage the timely documentation of progress and outcomes related to performance standards and contract requirements.
- Establish procedures for timely exiting of customers, following WIOA regulations, best practice and local policy.
- Provide monthly reports to the RWDB and the CEOs.

8. Maintenance of Case Records

For each WIOA customer, maintain a case record that contains, at a minimum – until any specific changes or additions are required under WIOA regulatory guidelines or advisories:

- The Individual Employment Plan and assessment results;
- WIOA paperwork, including customer applications, eligibility documentation for career services;
- Notes on customer contacts and progress (at a minimum every 30 days);
- End of activity documentation;
- Employment verifications;
- Exit documentations; and
- Documentation of customer follow-up for 12 months.

9. Connecting Job Seeker Services and Employer Services

- Employ Business Service Representatives/Job Placement staff.
- Business Service Representatives/Job Placement Staff will work under the functional supervision of the IWD Operations Manager.
- The Business Services team will address the needs of local employers by identifying job seeking customers available for open positions.
- Business Service Representatives will serve as job placement staff, at times doing specific job development for job seeking customers.
- Business Service Representatives will participate in Career Fairs and other business recruitment events, representing IowaWORKS.
- Business Service Representatives, through an integrated service approach with all partners, will assist local Business customers with recruitment of talent; assessments of potential applicants and incumbent workers (may include NCRC assessments); connecting local Business to available resources such as tax credits and other incentives; and, as appropriate, incumbent worker training, OJT, Registered Apprenticeships, and customized training opportunities.
- Business Service Representatives will, in coordination with the team and under functional supervision of the IWD Operations Manager, implement a sector strategy approach to identify business needs, define solutions, and, as appropriate to the solution, provide qualified talent.
- Provide Business Services meeting the performance measures established under WIOA; to increase business participation in the local workforce system; and establish a high level of satisfaction among business customers.

Performance Measures

Currently, Iowa uses Common Performance Measures for customers enrolled into WIA services. WIOA performance measures will take effect on July 1, 2016 and be based on data regarding exiters from the WIA program for the previous two years (beginning July 1, 2014). The successful applicant will be responsible for the follow-up and performance measures data for both WIA and WIOA measures and should be prepared to track the data for both sets of measures.

Below are the state negotiated performance measures given to the Regional Workforce Investment Board for PY 2015. Each local workforce board is responsible for negotiating these measures with the State. Local boards may accept the State negotiated measures as provided or may negotiate the regional rate.

The performance measures listed below are provided as a guideline and are subject to change.

Performance Measure	PY2015 Performance Goal
Adult	
Adult Entered Employment Rate (AEER):	63.0%
Adult Employment Retention Rate (ARR):	82.0%
Adult Average Earnings Rate (AAE):	\$11,700
Dislocated Worker	
DW Entered Employment Rate (AEER):	82.0%
DW Employment Retention Rate (ARR):	93.0%
DW Average Earnings Rate (AAE):	\$15,000

SECTION V. PROPOSAL APPLICATION INFORMATION

A. The Regional Workforce Development Board must receive your proposal by **4:00 PM Central Standard Time on April 8, 2016**. Any Proposals received after this deadline will be rejected and returned to applicants unopened.

Place the following items in a sealed package:

1. Your original proposal and five (5) copies (only one copy of the audit) and,
2. Your entire proposal with required attachments, saved in PDF (except audit) on a labeled thumb drive

Submit Package to: **Marla Loecke**
Regional Workforce Development Board
600 S. Pierce Ave
Mason City, Iowa 50401
marla.loecke@iwd.iowa.gov

Make sure your organization's name and Workforce Innovation and Opportunity Act – Title I Career Services for Adults and Dislocated Workers is on the exterior of your sealed proposal package. The date and time that the RWDB received your proposal will be written on the outside of the sealed packet and recorded on the cover page of your original proposal.

Use a clamp to hold the proposal. Do not staple the pages or put the proposal in a binder. Incomplete proposals and proposals received after 4:00 PM, Friday, April 8, 2016 will not be evaluated.

If you have questions regarding this Request for Proposals or any WIOA , please contact the issuing officer Marla Loecke, marla.loecke@iwd.iowa.gov .

- B.** This RFP does not commit the RWDB to award a grant, to pay any costs incurred in the preparation of a proposal, or to procure or contract for services or supplies prior to issuance of a written agreement. The RWDB retains the right to:
- Accept or reject any or all proposals received. (RWDB may request that bidders participate in negotiations and rewrite their applications as agreed upon during the negotiations.)
 - Discuss a proposed program with anyone potentially involved in the program.
 - Review the bidder's administrative and fiscal procedures relating to the potential award as part of the proposal review process. Proprietary rights to all data, materials, and documentation originated and prepared for the RWDB pursuant to a sub-award shall belong exclusively to the RWDB.
- C.** All proposals submitted will be subject to competitive review. The Proposal Evaluation Process is discussed in Section VII. Proposal funding decisions will be made by the Region 2 Workforce Development Board upon recommendation of the Proposal Review Sub-Committee.
- D.** The funding period for sub-awards under this solicitation will be from July 1, 2016-June 30, 2017 provided performance remains acceptable during that period. Any contract awarded from this RFP will include an option to renew for up to three additional years.
- E.** Bidder's right to appeal the decisions regarding the Awarding of Programs. See Section VII of this RFP.

Section VI. Format and Contents of the Proposal

Proposals must be submitted in the following format:

- One-inch margins
- 12 point font
- Number the pages in the footer
- Single spacing, with double spacing or indentation before new paragraphs
- Sections and sub-sections of the proposal labeled
- 25 pages maximum, *excluding the cover page, table of contents, budget, and requested attachments.*
- Please do not include additional attachments as they will not be reviewed.

A. Cover Sheet for Proposal

Complete all items on the cover sheet (appendix A).

B. Table of Contents

After you have written the entire proposal, number the pages and fill in the numbers on the Table of Contents. Please identify major sections and sub-sections. Please note that the cover sheet is numbered -i-, and the Table of Contents is numbered -ii-The Overview will be numbered page -1-.

C. Program Narrative

The Program Narrative should be clear and concise. Use bullet points, charts, etc. to enhance your narrative.

C.1. Overview of Services to be provided

Prepare an *Overview* of the Career Services that will be provided to Adults and Dislocated Workers. The *Overview* should be a summary of services which includes a plan to integrate with partner services, indicating the coordination between and among required and optional partners. Be sure to emphasize integration with partner services, indicating the close coordination you will have with the WIOA Core Partner programs; and your organizations understanding and commitment to the vision for WIOA programming and key operational principles.

C.2. Experience and Qualifications including Organizational Capacity/Profile

Bidders will be evaluated in this section on the extent to which the Organization is experienced and qualified to meet and exceed the expectations outlined in the RFP:

- Clearly identify why your organization is qualified to provide WIOA Adult and Dislocated Worker Career Services. Provide information on past performance and responsibilities with workforce development or employment programs.
- Provide program statistics for the past three years. It is important to include both qualitative and quantitative data. Be sure to include program successes as well as areas of improvement along with appropriate explanations for improving or maintain services in the future.
- State your organization's *Mission Statement* and demonstrate your capacity to integrate the Services conducted under this proposal into your organization's overall operations. Attach as **Proposal Attachment 1: an organizational chart**. This chart will clearly identify where WIOA Career Services functions will fall in your organization. NOTE: If an organization proposing is currently providing any other functions related to the RWDB or WIOA, clearly identify the separation of duties through staff reporting requirements and structures.

- Describe your financial stability for the past three years, detailing any difficulties regarding financial stability and how those difficulties have been (or are) being addressed.
- Attach to the end of only your original copy of this proposal a copy of the most recent financial audit of your organization conducted by a certified public accountant, indicating the period covered; or, if no audit has been performed, the most recent financial statement, indicating the period covered and an explanation of why no audited financial statement is available.
- Describe the relevant experience of your organization's key staff who would be involved in planning the Services your organization will deliver. (At the end of your proposal's Budget section, you will include a job description for each position funded in whole or in part in your organization's proposed budget. Job descriptions must specifically indicate, in addition to position duties, the staff skills, knowledge, and training needed for the position.)
- Describe your organization's internal monitoring system and demonstrate how it is effectively used to assure quality and identify program, personnel, and fiscal issues. Describe your organization's corrective action procedures.
- Describe the quality improvement protocol that your organization would implement to ensure continuous improvement of services delivery and participant outcome achievement.
- Assure that all individuals, including volunteers, will provide services in manner sensitive to the ethnic, racial, and linguistic characteristics and sexual orientation of program participants.

C.3. Service Delivery Plan for WIOA Title I Service for Adults and Dislocated Workers

In the discussion of your service delivery, explain how you intend to provide the services described in *Section IV Specifications WIOA Services for Adult and Dislocated Workers*. Your description should support the Service Integration Model, Vision for Programming, and Key Operational Principles. Discuss each item below:

- a. Outreach and Recruitment
- b. WIOA Registration/ Enrollment
- c. In-Depth Assessment
- d. Individual Employment Planning
- e. Individualized Career Services
- f. Training Services
- g. Employment Services
- h. Supportive Services
- i. Rapid Response
- j. Post- Employment Services
- k. Tracking and Reporting Progress and Outcomes
- l. Performance
- m. Maintenance of Case Records
- n. Connecting Job Seeker Services
- o. Employer Services

Be sure to provide sufficient detail. Discuss service flow and the use of integrated, function driven teams. A strong case-management and career planning system will lay the foundation for customer engagement and reporting of outcomes. Discussion of assessment activities should include types of assessment and how the result will be used in career planning. Identify target populations to be served and innovative ways to engage target populations in the delivery of services. Address specific target populations of individuals with disabilities, ex-offenders, and individuals with cultural barriers. Discuss how you will ensure timely services to priority populations. Provide plans for the proposed numbers of individuals to be served on caseloads for Career Advisors/ Employment Specialists.

C.4 Performance, Administration and Project Management

Discuss coordination with the 16 partner programs.

Discuss and affirm commitment to timely data entry and case noting of progress and activities.

Discuss the utilization of pre-vocational and training services, and credential attainment for program participants. Include in your discussion if you will utilize “outside” sources for pre-vocational training or if you will offer those services directly.

Discuss job placement activities and utilization of work-based learning options. How will your organization ensure appropriate attention to job placement in quality, in-demand occupations.

D. Budget and Related Information

Complete ***Budget Forms*** (Use the format provided. In Appendix B) Be sure to place your organization’s name and program name on the budget.

a. Wages

List all staff by job title, put any information that explains how you arrived at the amount of dollars in the total column, e.g., Career Advisor/ Employment Specialist, \$35,000/yr. for 12 months; Clerical Support Specialist, \$14.00/hr. for 20 hours/week for 48 weeks.

b. Fringe Benefits

List all fringe benefits in the same manner. Give all information needed for evaluators to check the amounts in columns, e.g., F.I.C.A.@.062 x number of positions.

c. Other Costs

Fill in all items completely. Budget line items listed have historically been proposed and include:

- Staff Wages and Fringes
- Materials and Supplies
- Equipment
- Facility Costs
- Participant Stipends and Supportive Services
- Staff Training Costs
- Contractual
- Work-Based Learning
- Training Costs
- Indirect
- Other

Budget Narrative/ Cost Allocation (Place the Budget Narrative directly after the Budget)

Fully explain how you derived each cost listed on the budget. If an item is a direct cost only to this budget, please state this. If any costs are divided between two or more funding sources, explain how these costs will be allocated, describing in detail the base to be used for each budgeted item.

Job Descriptions (Place the job descriptions after the budget explanation.)

Submit a description of the job responsibilities of each staff position listed on Budget Form. Also state the education/training (qualifications) required for the position. Make sure your organization's name and the date the job description was developed is on each job description.

PROGRAM PROPOSAL ATTACHMENTS

These Proposal Attachments are referenced in the directions for writing the *Program Narrative*.

<i>Proposal Attachment 1</i>	<i>Organizational Chart</i>
<i>Proposal Attachment 2</i>	<i>Budget/ Budget Narrative</i>
<i>Proposal Attachment 3</i>	<i>Job Descriptions</i>
<i>Proposal Attachment 4</i>	<i>Miscellaneous Information</i>
<u>Miscellaneous Information:</u>	

- **Audit and any Management Letters** (Submit only one copy of your audit.) Submit a copy of your organization's most recent audit and any management letters. (Submit only one copy of the audit and any management letters. Submit these as a separate attachment to the original copy of your proposal.)
- **Assurances** The person who is authorized to sign the Bidder's agreements must review and sign the Assurances form).
- **Proof of Liability Insurance** Submit your organization's current proof of liability insurance (Certificate of Liability Insurance).

SECTION VII. PROPOSAL EVALUATION PROCESS

Proposal Evaluators

Proposals will be evaluated by a team of RWDB members and community representatives who have no conflict of interest with any bidding organization.

Proposal Evaluation Reviews

- Staff will perform a technical review of each proposal prior to their being distributed to the review team.
- The technical review will determine if the proposal is complete and meets all the submission guidelines stated in the RFP.
- Proposals that are incomplete or fail to meet all submission guidelines stated in the RFP will be rejected.
- Bidders will be notified regarding the status of their proposal after the technical review.
- Bidders may appeal the technical review results. (RWDB will accept only appeals relating to the technical review of the proposal)
 - The RWDB will notify bidders via e-mail of the results of the technical review of their proposals. Bidders may then request a debriefing of their proposal's technical review. The RWDB Chair must receive this request via e-mail within two working days of the day the Bidder was e-mailed notification of the technical review results.
 - The debriefing will be held within three working days of the RWDB chair's receipt of the bidder's request for a debriefing of their proposal's technical review.
 - After the debriefing, the bidder will have three working days to present to the Board Chair a written appeal of any aspect of their proposal's technical review.
 - The RWDB Chair or designee will review the written appeal and make the final decision regarding any RWDB action on the appeal.
 - The Bidder will be notified in writing within three working days of the Board Chair or designee's decision regarding the appeal.
 - This will complete the Bidder's appeal process at the local RWDB level.
- Proposals will be evaluated by the review team.
- Bidders may request, in writing, feedback on the proposal submitted after the funding awards are determined.

SECTION VIII. APPENDICES

APPENDIX A: Cover Page

Proposal for
WIOA Title I Career Services
Adults & Dislocated Workers

Contract Period: July 1, 2016 – June 30, 2017

Proposing Organization Information:

[Insert Name of Person Responsible for RFP]

[Organization Mailing Address]

[Primary E-mail]

[Primary Phone]

[FEIN]

Proposed Region(s) to be Served:

By signing this document I acknowledge that I have read the proposal in its entirety and believe the proposal and attachments to be accurate.

Authorized Representative Signature

Date Signed

APPENDIX B: BUDGET

Budget Detail

Salaries and Wages

Provide a breakdown of your staff costs by completing the following:

Position/Title	Hourly Rate/ Salary	Hours/ Week	Total Cost, WIOA Adult	Total Cost, WIOA Dislocated Worker

Total Salaries:

Adult Program _____ **Dislocated Worker** _____

Fringe Benefits

Represents payments other than salaries and wages, made to staff or paid in behalf of or on their account, e.g., pensions, insurance, etc.

Fringe Benefit	Benefit, Percent of Salaries	Total Cost, WIOA Adult	Total Cost, WIOA Dislocated Worker
FICA			
Worker Compensation			
Health Insurance			
Retirement			
Other			

Total Fringe Benefits:

Adult Program _____ **Dislocated Worker** _____

Other Line Items

List your proposed cost for reach additional line item wherever applicable. Indicate the total cost proposed for each line item by listing it under the Total WIOA cost for each program. Please note that the line items listed below reflect the types of costs that have historically been proposed. You are not limited to these, nor are you required to propose a cost for each one.

Cost Category	Line Item Cost Adult Program	Line Item Cost Dislocated Worker
Travel		
Supplies		
Equipment		
Facilities		
Communications		
Instructional (Career Services)		
Support Services (Client Transportation, Childcare, etc.)		
Contractual		
Work-Based Learning		
Training		
Other (Printing, etc.)		
Other (Professional Services, Administration)		
Indirect Costs		

Total Other Line Items:

Adult Program _____ Dislocated Worker _____

GRAND TOTAL:(D.1 + D.2 + D.3)

Adult Program _____ Dislocated Worker _____

APPENDIX C

Budget Narrative

(Maximum of two pages)

1. Please use this section to describe your budget assumptions, sources of leveraged funds if any, unique expenditures, or other budget information you would like the evaluation committee to know. Provide written justification for the proposed expenses by line item for the first year of the project. The Budget Narrative should provide enough information that proposal evaluators need not seek clarification of the Contractor's budget proposal.
2. Please use this document to add information related to your Planned Enrollments as they relate to planned expenditures within your line item budget as appropriate.

ASSURANCES

I recognize that I must give assurance for each item below. If I cannot, this proposal will automatically be rejected.

1. I am authorized by my Board of Directors, Trustees, other legally qualified officer, or as the owner of this agency or business to submit this proposal.
2. We are not currently on any Federal, State of Iowa, or local Debarment List.
3. We will provide records to show that we are fiscally solvent, if needed.
4. We have the fiscal control and accounting procedures needed to ensure that WIOA funds will be used as required by law and contract.
5. We have additional funding sources and will not be dependent on WIOA funds alone.
6. We will meet all applicable Federal, State, and local compliance requirements. These include, but are not limited to:
 - Maintaining records that accurately reflect actual performance.
 - Maintaining record confidentiality, as required.
 - Reporting financial, participant, and performance data, as required.
 - Complying with Federal and State non-discrimination provisions.
 - Meeting requirements of Section 504 of the Rehabilitation Act of 1973.
 - Meeting all applicable labor laws, including the Child Labor Law standard.

We will not:

- Attempt to place participant in any type of work experience that will displace a current employee.
- Use WIOA money to assist, promote, or deter union organizing.
- Use funds to employ or train persons in sectarian activities.
- Use funds in the construction, operation, or maintenance of any part of a facility to be used for sectarian instruction or religious worship.

I hereby assure that all of the above are true.

Authorized Signature

Date

Title

APPENDIX E**EVALUATION CRITERIA AND SELECTION OF SERVICE PROVIDERS**

(For Providing Services to Title I Adults and Dislocated Workers PY 2016 – July 1, 2016 to June 30, 2017)

The criteria, which will be used to evaluate proposals, are listed below along with their point values. A total of 100 points is possible. An application must achieve a minimum score of 75 points in order to be considered for funding. The criteria can also be used by the bidder to ensure all items in the RFP are addressed.

Category	Criteria	Score
<p>Overview of Services (Executive Summary)</p> <p><i>(5 points possible)</i></p>	<p>Proposal includes an overview of the entire proposal including a summary of the understanding of the program and proposed scope of work.</p>	
<p>Experience and Qualifications</p> <p><i>(20 points possible)</i></p> <p><i>Organizational Capacity</i></p>	<p>Proposal provides an overview of the lead organization including: primary location, type of organization, years in business, and mission statement.</p> <p>The proposal provides evidence of program success consisting of past program performance and integration of principles and practices in program design of program success.</p> <p>Proposal describes the organization’s knowledge, expertise and experience working with under-served and targeted populations and the challenges within the workforce development industry.</p> <p>Proposal demonstrates the organization’s capacity to integrate the services conducted under this proposal into the organization’s overall operation.</p> <p>Proposal describes what systems are in place to ensure fiscal accountability, timely and appropriate expenditures of WIOA funds.</p> <p>Proposal describes the internal monitoring system and demonstrates how it is effectively used to assure quality and corrective action procedures, quality improvement protocols, and plans to ensure continuous improvement of service delivery and participant outcome achievement.</p> <p>Proposal describes how WIOA staff will participate/ partner in the IowaWORKS One-Stop Center.</p> <p>Proposal describes the organizational capacity and staff qualifications , skills, knowledge and experience to successfully deliver proposed services and activities.</p> <p>Proposal described the staffing plan and provided an organizational chart.</p> <p>Proposal describes the resources the organization brings to the</p>	

	<p>workforce system that will assist in the coordination and delivery of services and how the organization will support the work of staff and programs.</p>	
<p>Program Design/ Service Delivery Plan <i>(Total 40 points possible)</i></p> <p><i>Career Services</i></p> <p><i>Recruitment and Enrollment</i></p> <p><i>Assessment</i></p> <p><i>Career Counseling/ Planning</i></p> <p><i>Job Search</i></p> <p><i>Employment Services</i></p> <p><i>Education / Pre-vocational Services</i></p>	<p>Proposal describes targeted populations and numbers to be served.</p> <p>Proposal describes program recruiting and retention methods.</p> <p>Proposal identifies target populations to be served and any innovative strategies the team will use to engage target populations in delivery of services.</p> <p>Proposal describes the intake process, including the collection of basic information needed from potential clients, and determination of client suitability for program services.</p> <p>Proposal describes the assessments and assessment process to be used at intake and enrollment.</p> <p>Proposal outlines the sector(s)/ industries that will be the focus of program services, and why these sectors were selected.</p> <p>Proposal describes how in-depth assessments will be used in career planning and building individual employment plans that focus on identified sector strategies.</p> <p>Program details how career choices are linked to applicable work experience and how they are tied to in-demand industry sectors for the region.</p> <p>Proposal outlines strategies to be used for upskilling participants in job search methods (i.e. workshops, resume building, interviewing, etc.)</p> <p>Proposal describes the work readiness training program to be used outlining the curriculum, competencies, assessments and standards for completion.</p> <p>Proposal describes job placement activities and utilization of work-based learning options.</p> <p>Proposal describes how the organization will ensure appropriate attention to job placement in quality, in-demand occupations.</p> <p>Proposal describes the education/ training programs, which can include occupational skills training, pre-apprenticeship, post-secondary bridge programs and/or post-secondary education.</p> <p>Proposal describes how the education/ training programs will lead to jobs with livable wages.</p> <p>Proposal describes collaboration with partners to offer innovative strategies to engage targeted populations to transition into post-secondary or skill certification programs.</p>	

<p><i>Supportive Services</i></p> <p><i>Case Management</i></p> <p><i>Training Services</i></p> <p><i>Rapid Response</i></p> <p><i>Post-Employment Services</i></p>	<p>Proposed methods of service delivery address participant needs holistically.</p> <p>Proposal describes what supportive services will be used to address barriers.</p> <p>Proposal clearly defines case management and the process used to provide support and guidance to participants during enrollment and follow-up.</p> <p>Proposal outlines the process for in-depth assessment which documents the need for training for participants who have demonstrated an inability to attain self-sufficiency and interested in and capable of training in in-demand occupations.</p> <p>Proposal describes strategies to provide access to On-the-Job Training, Customized Training, Occupational Skills Training and Registered Apprenticeships.</p> <p>Proposal outlines a strategy to leverage and coordinate community and public resources for lay-offs promoting a seamless delivery of services to affected workers.</p> <p>Proposal describes creative, innovative and successful methods to ensure communication with program participants after exit.</p> <p>The proposal demonstrates the relationship between proposed follow-up activities and post-exit performance measures.</p>	
<p><i>Performance, Administration, and Project Management</i></p> <p><i>(20 points possible)</i></p> <p><i>Partnerships/ Collaboration</i></p>	<p>Proposal describes the role that career services staff plays in the Integrated One-Stop Delivery System.</p> <p>Proposal describes the planned outcomes for the adults and dislocated worker program and how they will be measured.</p> <p>Proposal describes the relationship between WIOA performance measures addressed and program services.</p> <p>Proposal describes the process for ensuring quality, compliance and proper documentation for all participant files.</p> <p>Proposal describes how reporting requirements will be met.</p> <p>Proposal describes how the organization will ensure funds are used properly and according to the spending plan.</p> <p>Proposal describes the relationship and commitments of other agencies providing program services and provides evidence of established relationship and commitments of cooperating agencies.</p>	

<p><i>Employer Connections</i></p>	<p>Proposal describes how services will be coordinated by cooperating agencies for program participants</p> <p>Proposal describes specific partner roles and how the proposed partnerships will leverage additional funding to serve program participants.</p> <p>Proposal describes efforts to coordinate delivery of services to business/ employers among partners.</p> <p>Proposal describes strategies to identify the workforce development needs of business/ employers.</p> <p>Proposal describes efforts that will support sector strategies.</p>	
<p><i>Budget/ Budget Narrative</i></p> <p>(15 possible points)</p>	<p>Budget is reasonable and well-defined for collaborative service delivery.</p> <p>Budget Narrative justifies the need for all costs built into the line-item detail and the methodology used to derive each cost.</p>	

TOTAL SCORE: _____

APPENDIX F: PROPOSAL CHECKLIST

PROPOSAL TECHNICAL REVIEW CHECKLIST

WIOA Title I Adults and Dislocated Worker Services – PY 16

RWDB staff will screen the proposals to ensure that the proposals meet the technical review standards listed below. A proposal review team will then evaluate proposals meeting all these technical review standards.

Check if the proposal/bidder meets the following standards...

Technical Review Standards

- The original proposal, with the last financial audit, five (5) copies of the proposal and a thumb drive containing the proposal.

The proposal contains all the following:

- Cover Sheet/ Application Packet
- Table of Contents
- Proposal Narrative (single spaced, 12 point font, maximum of 25 pages), sections and sub-sections labeled
 - Overview of Services to be provided
 - Experience and Qualifications, including Organizational Capacity
 - Program Design, Service Delivery Plan
 - Performance, Administration, and Project Management
- Required Attachments:
 - Organization Chart
 - Budget
 - Budget Narrative
 - Job Descriptions
 - Cost Allocation Plan (if applicable)
 - Indirect Cost Agreement (if applicable)
 - Audited Financial Statement
 - Assurances
 - Proof of Liability Insurance
- The proposal contains all the necessary signatures.