REQUEST FOR PROPOSAL

Services Provider:
WIOA Adult Services/Dislocated Worker Services for the
WorkSource System

Release Date: January 13, 2020
Bidder’s Conference: January 22, 2020
Due Date: February 18, 2020, 4:00 p.m. (Pacific Standard Time)
Proposed Contract Period:
July 1, 2020 – June 30, 2021
With mutually agreed option for annual extension to June 30, 2024

Pacific Mountain Workforce Development Council
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Phone: 360-704-3568 Fax: 360-704-6444
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www.pacmtn.org

The Pacific Mountain Workforce Development Council is an Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request to individuals with disabilities. WA Relay 711
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Introduction

Pacific Mountain Workforce Development Council (PacMtn) serves as the administrative/fiscal agent for the Pacific Mountain Workforce Development Area, a consortium of five (5) counties in the southwest/central area of the State of Washington under the Workforce Innovation and Opportunity Act of 2014 (WIOA). In aggregate, these contiguous counties have a population of nearly half a million and cover 7000 square miles. The counties differ from each other in their demographics and needs, but through years of deliberate attention to regionalism, the counties have experienced many successful initiatives and are actively planning others.

As administrative/fiscal agent for workforce development programs, PacMtn is soliciting service providers to deliver services to:

- Adult and Dislocated Workers who are unemployed, under-employed, or in need of training and career services;

One or more one-year contracts for services may be awarded pursuant to this RFP. The beginning date will be on or around July 1, 2020. The WDC may also elect to award additional one-year contracts pursuant to this RFP for the years beginning July 1, 2021, July 1, 2022 and July 1, 2023. Additional annual awards shall be contingent upon successful performance, funding levels and the discretion of PacMtn.

If additional funding becomes available from any source between July 1, 2020 and June 30, 2023 those funds may be awarded for services described in this RFP.

Background

On July 22, 2014 President Barack Obama signed the Workforce Innovation and Opportunity Act (WIOA), which is designed to improve and streamline access to federally funded employment, education, training, and career services. WIOA supersedes the Workforce Investment Act (WIA) of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. It took effect on July 1, 2015. WIOA funds are allocated by Congress on a program year basis, running from July 1 through June 30 of the following year.

WIOA requires that the way services are delivered be changed in fundamental ways and demands transitions in federal, state and local rules and ways of doing business. The changes emphasize system-building and universal services at the State and local levels. This revitalized workforce system will be characterized by three critical hallmarks of excellence:

- The needs of business and workers drive workforce solutions;

- One-Stop Centers provide excellent, integrated customer service to jobseekers and employers and focus on continuous improvement, and;

- The workforce system is a critical part of creating strong regional economies and plays an active role in the community development.
As Governor Inslee has said, “At the heart of it, the Workforce Innovation and Opportunity Act presents tremendous opportunity to ensure that every resident of our state has the chance to earn a living wage and pursue a career, and that every employer has the skilled worker it needs to grow and prosper in our state.”

Provision of services specified in this RFP requires substantive knowledge and understanding of the WIOA law and any applicable regulations and all state policies, procedures and directives related to WIOA. Successful respondents to this RFP must also be flexible and willing to respond and adapt to new directions as they occur. For more information on WIOA, its implementing regulations and any other information of interest, please visit http://www.doleta.gov/wioa/.

January 14, 2016 the PacMtn Board of Directors and Consortium Members (CLEO) met in an all-day strategic planning session. A brief summary of that discussion follows and will be used as the basis for the 2016-2020 Strategic Plan to be adopted in June. Bidders may want to consider this information in developing their responses.

PacMtn Mission, Vision and Values

Add

2016-2020 WDC Board of Directors “Big Picture” and Aspirational Themes

- Reduce income disparity in the region
- Enhance services and attention for special and targeted populations that address equity
- Create strong sector lead presence in all counties served
- Build employer trust
- Establish an effective outreach plan
- Think “collective impact”, partnerships and leverage
- Be accountable and responsible for outcomes and proper use of funds
- Implement the federal legislation and stay fully compliant with the Opportunity Act

In 2020, the PacMtn Board will be engaged in a full strategic planning process. Selected bidders should be fully committed to identified PacMtn Workforce Strategic Plan Goals and Priorities.

RFP Goals

WIOA creates an extraordinary opportunity to improve job and career options for workers, jobseekers and participants through an integrated, job-driven public workforce system that links diverse talent to businesses and meets their workforce needs. It supports the development of strong, vibrant regional economies where businesses thrive and people want to live and work.

WIOA has fundamentally changed how workforce development processes are conducted. It mandates more strategic, responsive ways to do business and the ability to continuously improve, as well as One-Stop systems that allow customers to be served conveniently for them, creatively and efficiently. PacMtn seeks partners to collaborate in creating and enhancing this new system and in utilizing and developing new best practices for serving both business and workforce needs. PacMtn further views this system as an opportunity to collaborate with many community organizations that may also benefit from partnering to support business and workforce services.
PacMtn’s goals for this RFP are driven by its values:

- Integrated high quality service delivery
- Highest quality and priority of customer service
- Hands on involvement with partners and contractors
- Accessible, open and flat organizational structures
- Dedication to vulnerable populations previously left at the margins
- Straight truth talk with recognition of differences and accountabilities
- Respect, inclusion and collegiality with all partners across the system

In these contexts, it is the intention of PacMtn that the successful bidder(s) will help to shape a Local Workforce System that:

- Integrates, region-wide services
- Provides universal access across the workforce system
- Identifies and removes barriers to workforce services
- Values continuous improvement

Specific Areas of Focus

In attaining these overarching goals, there are specific areas to which attention must be given. Responses to this RFP will address how the following will be achieved within the One-Stop system in an adaptive and creative manner. The successful respondent(s) will work with PacMtn and other partners to achieve the following:

A. Integrated, Region-Wide Service. PacMtn has established WorkSource offices in the following locations. Whomever is awarded the contract will provide services utilizing the following WorkSource sites across the region:

- Grays Harbor WorkSource Affiliate Site – Aberdeen, Washington
- Lewis County WorkSource Affiliate Site – Chehalis, Washington
- Mason County WorkSource Affiliate Site – Shelton, Washington
- Thurston County WorkSource Center – Tumwater, Washington

PacMtn Connection Sites:

- Timberland Regional Library Network—27 locations in PacMtn Region
- South Bend Branch Community Services Office (DSHS)—South Bend, Washington
- Long Beach Branch Community Services Office (DSHS)—Long Beach, Washington

Connection sites are portals for electronic WorkSource Access. Connection sites provide access to PC’s or other internet connected devices, with video conferencing capabilities for job seekers to find easy access to WorkSourceWA.com, Skype, on-line video trainings or other on-line resources that may be required by PacMtn WDC. Connection sites are also used to increase system integration. Connection site staff participate in quarterly meetings, staff training, on-going communications as well as provide space for workshops and meetings with job seekers.
The One-Stop system designed to focus on integrated service delivery. Staff and contractors will be cross-trained to provide flexible and most appropriate service and customers will follow pathways based on assessment of their skills and needs with navigation and coaching support to achieve desired career outcomes. Employers will be engaged at all levels so that employer needs are met. The focus of this integration will enhance service delivery through focus upon:

- Functional Integration--Staff working in a co-enrollment ISD environment are organized into functional teams supported by functional leaders, rather than by programs, to meet the needs of customers. Rather than simply providing a “countable” service, co-enrolled ISD groups services and other activities into functions. Staff expertise is used to design these functions to reduce unnecessary steps and create a warm and meaningful customer interaction.
- Common Outcomes-- WIOA increases the number of WorkSource partner programs with common outcome measures for all customers.
- Robust Menu of Services-- The PacMtn WorkSource System will provide a robust menu of job seeker and business services that result in positive labor market outcomes (e.g., job seekers finding jobs, keeping jobs, and continuing on the career ladders, businesses finding appropriately skilled workers, finding resources to continually upgrade their workforce, etc.).
- Voice of Customer-- All WorkSource partners and staff will be engaged in gathering and using customer input (job seeker and employer) to continuously improve services.

**B. Priority Industry Sectors and Career Pathways.**

PacMtn has prioritized several industry sectors as the focus of service strategies under 2020-2021 contracts. Health Care and social services technology support services and media, utilities, business and administration and professional services, retail, food preparation and restaurant services, and construction are forecasted to be the region’s fastest-growing industries over the next decade. These industries were identified in the 2019 PacMtn Industry Cluster Study and have been validated by regional sector engagement and labor market analysis.

Contractors selected through this RFP will coordinate with PacMtn staff and regional partners to serve businesses in identified pathways and provide opportunities for job-seekers to enter and advance in high-quality jobs and career in these pathways. Contractors will connect and align services with regional, employer driven partnerships of industry, education and training, and other stakeholders that focus on the workforce needs of key industries in a regional labor market. Priority Career Pathways include:

- Construction Laborers/Management
- Utility & Highway Maintenance Worker
- Frontline & Administrative Healthcare Support
- Social Services and Elder Care
- Business
- Admin and Office Support
- Retail & Customer Service
- Food Preparation & Restaurant Services

Bidders will describe collaborative and innovative approaches to aligning with sector and career pathways partnerships, leveraging resources, and strengthening career pathways in PacMtn priority pathways, such as:
• Ensuring that students and job-seekers can obtain and make use of career pathway information
• Participate in sector-focused events
• Identifying or designing training that build in-demand skills and competencies and helps individuals progress along career pathways
• Using data to inform and improve programming
• Planning cohort-based trainings to be made available across the workforce development system (as applicable)

Training services shall be directly linked to occupations that are in demand in the PacMtn region. To the greatest extent possible, training should be linked to a career pathway in high-growth sectors that have entry-level and mid-level occupations leading to self-sufficiency.

For further detailed information on Industry Sectors and how they serve and play a role in our regional economy and employment, refer to: [https://pacmtn.org/regional-sectors/](https://pacmtn.org/regional-sectors/)

C. Technology and Accessibility

The use of technology to remove barriers for workers and enhance their access to services is a “game changer.” Advances in telecommunications and technology potentially allow for seamless, universal, and remote access to education, training, and other workforce development services. While technology cannot fix all barrier access problems, in many cases it will free up staff to tackle more difficult access issues. Executing universal accessibility to PacMtn’s workforce system will require a concerted, long-term effort from all partners, and a willingness to adapt and refine service delivery strategies to meet customer needs. This collective commitment to leveraged resources is essential if all Washington workers are to benefit from an improving economy. The partnership between PacMtn and Timberland Regional Library has created better access to technology by creating WorkSource Connection Sites across the region. This partnership has helped PacMtn reach its long-term goal of increasing access to technology to assure that customers have the full array of services regardless of where they chose to access WorkSource services in the region.

D. Universal Access across the Workforce System

Fundamental to PacMtn’s vision for the workforce system is the concept of universal accessibility: PacMtn’s workforce system must be prepared and able to serve jobseekers from all kinds of backgrounds, who face a variety of barriers. Universal accessibility encompasses both physical accessibility of all facilities, as well as programmatic accessibility—taking into account customers’ particular access needs. Integration of service delivery and better coordination among workforce system partners will allow services and delivery approaches to be customized to particular access needs.

E. Identifying and Removing Barriers to Workforce Services

PacMtn embraces WIOA as a chance to improve service delivery and remove barriers to access for all individuals with barriers to employment, not just those populations covered by the Americans with Disabilities Act. While developing recommendations on accessibility, the Workforce Board engaged stakeholders, staff, and policy experts representing a wide range of the 14 populations designated as “populations with barriers” under WIOA. The populations with significant or multiple barriers to employment should receive priority for services. Sometimes these populations will be referred to as “hard-to-serve” or “hard-to-employ” clients.
Identified Targeted Populations:

PacMtn places high value on services for the most marginalized individuals who struggle to prepare for, find and maintain employment. Some of these special populations served by the workforce system include, but are not limited to:

- Veterans and eligible spouses
- Individuals with disabilities, both youth and adults
- English language learners (limited English proficient)
- Migrant and seasonal farmworkers
- Out-of-school youth
- Adult and youth ex-offenders (justice-involved)
- Recipients of Public Assistance (TANF, SNAP, SSI, Medicaid, etc.)
- Youth in, or previously in, foster care
- Homeless individuals, both youth and adults
- Runaway youth
- Pregnant and parenting youth
- The long-term unemployed
- Low-income workers earning wages below self-sufficiency
- Basic skills deficient individuals
- The over 55 age group

The PacMtn Targeted Populations Board Committee determined the populations that are Priority for 2019-2021 are:

- Individuals with disabilities, both youth and adults
- Individuals containing with, or in recovery from, Substance Use Disorder
- Recipients of Public Assistance
- Homeless Individuals
- Adult and youth ex-offenders (Justice-involved/re-entry)
- Veterans

Section II

Eligible Organizations

Organizations eligible to submit proposals may fall within any of the following categories:

- Governmental agencies
- Private non-profit organizations
• Private for-profit businesses
• Educational entities

Should multiple agencies form a consortium to submit one proposal, a lead agency must be identified. Lead agencies submitting proposals that incorporate a collaborative relationship with other entities in the provision of comprehensive services must clearly identify the collaborating organizations, the services they will provide, and the funding source to support those services.

**Policy of Competition**

The Pacific Mountain Workforce Development Council conducts all procurement transactions in a manner providing full and open competition. The RFP identifies all evaluation factors and their relative importance. All responses will be honored to the maximum extent practical. Technical, financial and organizational evaluations will be made of all proposals received found to be responsive to the RFP.

The Pacific Mountain Workforce Development Council and Consortium will carry out the procurement review responsibilities with complete impartiality and without preferential treatment to any response.

**RFP Key Events & Dates**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tr>
<td>Request for Proposals Issued</td>
<td>January 13, 2020</td>
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<tr>
<td>Bidder’s Conference - 10 AM to Noon</td>
<td>January 22, 2020</td>
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<tr>
<td>Deadline for Receipt of Questions, 4:00 PM (Pacific Time)</td>
<td>February 6, 2020</td>
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<tr>
<td><strong>Deadline for Receipt of Proposals, 4:00 PM (Pacific Time)</strong></td>
<td><strong>February 18, 2020</strong></td>
</tr>
<tr>
<td>Formal Review Process of Proposals Begins</td>
<td>February 19, 2020</td>
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<tr>
<td>Interviews</td>
<td>To be scheduled; between March 9 and March 10</td>
</tr>
<tr>
<td>Successful Bidders Posted on Website</td>
<td>No later than March 13, 2020</td>
</tr>
<tr>
<td>Contract and Budget Negotiations Begin with Successful Bidder</td>
<td>Week of March 23, 2020</td>
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<td>*following mandatory appeals period</td>
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<tr>
<td>Transition Period for Contract Start-up</td>
<td>May and June, 2020</td>
</tr>
<tr>
<td>Contract Start Date</td>
<td>July 1, 2020</td>
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**Specific dates are subject to change. Please check back on the PacMtn Website at https://pacmtn.org/service-provider-opportunities/ for any updates.**

**Bidders Conference**

A bidders’ conference will be held as follows, potential bidders are highly encouraged to attend:

- **Date:** January 22, 2020
- **Time:** 10:00 a.m. to Noon
- **Location:** Pacific Mountain Workforce Development Council
  1570 Irving St. SW
Questions and Answers

Questions asked at the bidders’ conference, together with answers to those questions, will be posted online at www.pacmtn.org. In addition, questions about the RFP may be sent to contracts@PacMtn.org by February 6, 2020 @ 4pm and will be posted with answers as soon as possible thereafter. It is the responsibility of parties submitting proposals to review those questions and answers.

Proposal Submittal

To be considered for review, proposals must follow the instructions in this RFP, provide the information required in the Response Package and include all of the required attachments (signed and dated) by your organization’s authorized representative.

Proposal packet shall include:

A. Cover Sheet  
B. Certification  
C. General and Financial Questions (not to exceed 5 pages single-spaced)  
D. Program Specific Questions (not to exceed 10 pages single-spaced)  
   o Program Services Work Plan/Timeline  
   o Service Delivery Flowchart  
E. Performance Outcomes Form  
F. Program Budget Form  
G. Past/Current Contracts Form  
H. Acknowledgment of PacMtn Adult and Dislocated Worker Program Policy and Procedures

The following is required for each proposal submitted:

- Five (5) hard copy original proposal signed in blue ink  
  - 8 1/2" X 11" white bond paper, single-sided  
  - 1" margins, 12 point font, double spaced  
  - Bound only by a clip (no permanent binding, i.e., staples, glue)  
  - No attachments not called for in the RFP
- One electronic copy of the proposal in Word format sent to contracts@pacmtn.org.

Proposals are due February 18, 2020 by 4:00 PM (Pacific Time). Deliver to:

   Pacific Mountain Workforce Development Council  
   1570 Irving Street SW  
   Tumwater, WA 98512  
   Email: contracts@pacmtn.org

If an email with all the required documentation is received by the due date and time, while the hard copy is in transit, the packet will be considered provided that the hard copy arrives no later than February 18, 2020. Proposals not received electronically by the due date and in hard copy by that due date will be automatically disqualified from competition – no exceptions. Faxed proposals will not be accepted.
Evaluation of Proposals & Award of Contract

The successful proposal(s) will demonstrate the ability to deliver services as proposed while working flexibly toward the value-driven goals within this potentially shifting structure and changing roles, supporting this system as a partner, and helping to assure that customers are served in innovative and effective ways, including exploration of serving customers online and remotely using new technology.

The successful proposal for Adult/Dislocated Worker services will also demonstrate capacity to support Rapid Response grant activities for dislocated workers impacted by a business closure. Additionally, Department of Labor regulations may change, but may not have been yet as of the time of issuing this RFP, there may be some program changes resulting from those regulations. The successful proposal(s) will include demonstration of flexibility, agility and innovation that adjusts programming to comply with future regulations. Applicants are encouraged to familiarize themselves with the proposed regulations and guidance issued by the Department of Labor.

Proposal Review

Evaluation Criteria. Proposals will be evaluated based on the following criteria:

- Technical Proposal 50%
- Financial Accountability 15%
- Organizational Capacity 35%

Following evaluation by the Review Panel, and including any interviews, a recommendation will be forwarded to the PacMtn Council.

Each proposal submitted will be evaluated on its own merit. Interviews with up to three proponents may be scheduled, at a date to be determined between March 9th and March 12, 2020, if needed to clarify elements in the proposals.

PacMtn reserves the right to reject, or to seek modifications of any proposal offered if in PacMtn’s sole discretion the proposal offer does not assist the system in meeting the overall service objectives set forth in this RFP.

PacMtn reserves the right to offer an award to the second highest rated proposal if a contract cannot be successfully negotiated, or to renegotiate or reissue an RFP should an appeal for non-award be upheld.

Proposals that are not funded will not be returned.

Determination of Cost/Price Reasonableness

The proposal(s) should be submitted in the most favorable budgetary, technical, and programmatic terms. To determine if costs are correctly calculated and are reasonable, necessary, allowable and allocable, the Pacific Mountain Workforce Development Council staff will conduct a comparative analysis that will become part of the evaluation process.
**Award of Contract**

Submittal of a successful proposal(s) does not constitute a contract with PacMtn. The contract award will not be final until PacMtn and the successful proposer have executed a mutually satisfactory contractual agreement.

**Appeal Process**

Any appeal of the final contractor(s) selected must state the basis of the appeal. Appeals can be sent in writing within seven (7) calendar days after the publication of the successful contractor(s) to:

Cheryl Fambles, CEO  
Pacific Mountain Workforce Development Council  
1570 Irving St SW  
Tumwater, WA 98512  
contracts@PacMtn.org

It is the responsibility of proposers to check for the publication of successful bidders at the following website: [www.pacmtn.org](http://www.pacmtn.org).

**Acknowledgements**

1. This Request for Proposals is not in itself an offer of work, it does not commit the Pacific Mountain Workforce Development Council to fund any proposals submitted, nor is it liable for any costs incurred in the preparation or research of proposals.

2. Any funding awarded will be subject to the availability of federal funding granted to the Pacific Mountain Workforce Development Council through the State of Washington Employment Security Department and the U.S. Department of Labor. Should the availability of such funding decrease before or following any award to a sub-recipient, the award will be revised accordingly. In addition, if awarded, the contractor must be willing to alter program design based on subsequent direction provided by the state, U.S. Department of Labor or PacMtn.
Adult and Dislocated Worker Scope of Work

Responses should address how the following programs will be provided within the One-stop system in an adaptive and creative manner.

The goal of Adult and Dislocated Worker services is to support career advancement and income mobility by helping jobseekers and incumbent workers address educational needs and develop high-demand skills. All adults may be enrolled and evaluated for service delivery potential. Adults and dislocated workers are eligible to receive career services if the individual is at least eighteen (18) years of age and is enrolled in either the WIOA Adult or Dislocated Worker formula program. There are three (3) types of career services: basic, individualized, and follow-up. There is no sequence requirement for services.

Service delivery may include but not be limited to outreach, intake (which may include worker profiling), and orientation to the information and other services available; followed by an initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs. For further details on service delivery under WIOA regulations, refer to https://www.doleta.gov/wioa/

The successful proposal(s) will include demonstration of ability to adjust programming to comply with future Department of Labor regulations. Applicants are encouraged to familiarize themselves with the proposed regulations and guidance issued by the Department of Labor.

Career Services. Basic career services are available to adults or dislocated workers through the WorkSource delivery system after a determination has been made of whether the individual is eligible to receive assistance. This determination will include outreach, intake (which may include worker profiling), and orientation to the information and other services available; followed by an initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs.

Individualized Career Services. Individualized career services are available to individuals once WorkSource staff has determined the service is needed for the individual to obtain or retain employment. WorkSource Wagner-Peyser, Adult and Dislocated Worker Program Staff may use recent previous assessments by partner programs to determine if individualized career services would be appropriate.

Follow-Up Services. Follow-up services must be provided as appropriate for participants who are placed in unsubsidized employment, for up to twelve (12) months after the first day of employment. Counseling about the work place is an appropriate type of follow-up service. Follow-up services do not extend the date of exit in performance reporting.

Follow-up services include, but are not limited to determining if:

- Certification or credentials have been attained;
- Employed or self-employed after the first, second, or third quarter exit;
- An exit exclusion has occurred;
- Post-program support services have been needed; and/or
- Program follow-up services needed.

Training Services. Training services can be critical to the employment success of many adults and dislocated workers. There is no sequence of service requirement for “career services” and training. This
means that the adult and Dislocated Worker staff may determine training is appropriate regardless of whether the individual has received basic or individualized career services first.

**Rapid Response.** The successful proposal for Adult and Dislocated Worker services will also demonstrate capacity to support rapid response grant activities supporting dislocated workers in cases where there are business changes resulting in potentially significant job losses.

**Performance Measures.** The following performance measures have been negotiated and agreed to by the State of Washington. The successful proposal will demonstrate how these minimum performance measures can be exceeded, how career pathways can be provided in order for job seekers to move into higher wage jobs, and how future performance measures can be optimized.

Adult/Dislocated Worker Performance Measures for PY18-19

<table>
<thead>
<tr>
<th>Adult Performance Measure</th>
<th>Target</th>
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<tbody>
<tr>
<td><strong>PERFORMANCE METRIC - ADULT</strong></td>
<td></td>
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<tr>
<td>Entered Employment - # of participants who are employed in (Q2) Post-Exit</td>
<td>67.1%</td>
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<tr>
<td>Employment Retention - # of participants who are employed in (Q4) Post-Exit</td>
<td>66.4%</td>
</tr>
<tr>
<td>Average Earnings - Median earnings (Q2) Post-Exit</td>
<td>$5,036</td>
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<tr>
<td>Credential Attainment Rate - Participants Obtaining a Post-Secondary Credential or Secondary School Diploma/Equivalent (During Participation or Within 1 Year of Exit)</td>
<td>63.4%</td>
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<table>
<thead>
<tr>
<th>Dislocated Worker Performance Measure</th>
<th>Target</th>
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<tr>
<td><strong>PERFORMANCE METRIC – Dislocated Worker</strong></td>
<td></td>
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<tr>
<td>Entered Employment - # of participants who are employed in (Q2) Post-Exit</td>
<td>61.3%</td>
</tr>
<tr>
<td>Employment Retention - # of participants who are employed in (Q4) Post-Exit</td>
<td>58.7%</td>
</tr>
<tr>
<td>Average Earnings - Median earnings (Q2) Post-Exit</td>
<td>$6,444</td>
</tr>
<tr>
<td>Credential Attainment Rate - Participants Obtaining a Post-Secondary Credential or Secondary School Diploma/Equivalent (During Participation or Within 1 Year of Exit)</td>
<td>66.8%</td>
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Section III

Requested Information-Questions

The following section contains questions that must be answered in the proposal. General questions must be answered by all respondents.

Questions Specific to Adult & Dislocated Worker Services

Please limit responses to ten (10) pages.

1. Provide a program services plan that describes your strategy to provide Adult and Dislocated Worker program services within the WorkSource system. Include:
   - A clear understanding of the One-Stop principles and requirements of WorkSource partners
   - Description of how your proposal will enhance the current WorkSource system-specifically how it will add value
   - How you will leverage and coordinate with other services provided by partners
   - How will you commit the current quality improvement initiatives identified by PacMtn

Proposals should incorporate a description of current involvement as a WorkSource partner or future implementation plans for becoming a WorkSource partner. Please respond to the requirements for becoming a partner including how you will accomplish the following:

a. Requirement of a visible and reliable staff presence, which includes co-location of staff at the WorkSource Center and/or Affiliate site during the entire duration of the contract. A strong operational link with partner staff for Adult and Dislocated Worker program is required.

b. Regular attendance at partnership meetings and functional team meetings;

c. Participation in or facilitation of various functional workgroups assigned by the Operator;

d. Participation in Continuous Quality Improvement efforts;

e. Successful contribution to overall WorkSource system performance measures;

f. Sharing best practices and innovative service delivery strategies with partners;

g. Ability and capacity to utilize PacMtn’s tracking system and willingness to sign the required cost sharing Memorandum of Understanding and Infrastructure Funding Agreement with relevant WorkSource partners and PacMtn and participate in the operation of the One-Stop system.

h. Employer engagement through partnerships including outreach and provision of services to meet the needs of employers.

2. Describe the experience and demonstrated commitment your organization has to serving the identified priority populations identified in federal law and by the PacMtn WDC Board.
3. Describe how your program will integrate Rapid Response services and transition Rapid Response customers to WorkSource services. Include your strategy and experience in working with business and labor organizations.

4. Provide a service delivery plan that describes your strategy to provide Adult and Dislocated Worker services through case-management, individualized career services, beginning with outreach, assessment and registration. Articulate the methodology in using the Individual Service Strategy and leading to successful education, job placement and retention. Include, where appropriate, any services leveraged or provided by partners. Use the following outline to summarize your program in narrative format:

   a. Adult and Dislocated Worker Case Management Service Plan - Describe in your narrative how you will recruit, provide case management, individualized career services and achieve the goals of PacMtn. Describe (attest) how you will honor and fulfill current client service plans to employment to maintain client service continuity.

   b. Identify your plan for colocation of your staff in One-Stop facilities to deliver Adult and Dislocated services and service integration with the UI system/Wagner-Peyser programs. Explain how you will outreach and provide services to eligible adults and dislocated workers across the PacMtn region. Describe your agency’s experience working with economically disadvantaged adults.

   c. Describe how you plan to:

      i. Provide Adult and Dislocated Worker services including individualized career services, supportive services and training (ITA, OJT, Business Internship, Customized Training, etc.);

      ii. Facilitate Adult and Dislocated Worker referrals to needed non-WIOA services;

      iii. Assess customer skills and needs;

      iv. Facilitate customer decision-making regarding WIOA services;

      v. Develop and maintain the Individual Employment Plan;

      vi. Facilitate coordination of Adult and Dislocated Worker services between various other WIOA services;

      vii. Collaborate with other PacMtn WIOA funded programs like

      viii. Collaborate with Washington State Department of Commerce WorkFirst programs to provide transition services to the TANF population.

   d. Describe what activities and strategies you will use to achieve WIOA Common Measures and Washington State Performance Measures; and how you attend to provide follow-up services for participants placed in unsubsidized employment, for not less than 12 months after the first day of employment.

General Questions – Financial Accountability/Organizational Capacity

Please limit responses to four (5) pages, not including attachments.

1. Describe staff qualifications/experience and key staff members’ length of service in the areas of workforce development. Provide specific examples of the staff’s creativity and flexibility in resolving contemporary and complex workforce problems. Describe staff abilities and experience working as a member of a diverse team that includes people from varied backgrounds and ages. Describe how
your organizational hiring process will consider any staff dislocated by the transfer of programs to this service provider.

2. Describe your organizational experience maintaining, tracking and reporting use of federal dollars.

3. Does your organization have yearly audits or financial reviews? If so, please provide copy of latest review. If any findings or issues are in the report please explain. What internal controls do you use to ensure that your financial systems are accurate and in compliance with internal controls?

4. How does your organization handle distribution of shared cost amongst its program? Provide copy of approved cost allocation plan or written policy/procedures if available.

5. Explain methodology or process in how budget proposals were generated. Explain your evaluation of how you determined equity in assigning resources to each area.

6. Provide information about your business/organization including vision, mission, current customer base (type and size), and longevity. Describe how your business/organization is a partner within a system that delivers education, employment and training services. Describe how this proposal will connect to your mission and organizational goals. Explain how your proposal aligns with the relevant goals of this RFP.

7. Describe your experience in administration and contract management. Indicate how your prior or current record of performance relates to performance within your current design.

8. Describe your organizations familiarity with the use of technology and particularly utilization of WA State workforce data management systems. Provide an example of how your organization used technology to enhance the customer experience.

9. Describe your organization’s ability to support and then demonstrate with examples from previous worksites the ways your organization can meet PacMtn’s goals of integrated services delivery, career path success, enhanced focus on customer service and continuous improvement.
Section IV

General Terms & Conditions

Read the Contract General Terms and Conditions below. Should your proposal(s) be selected for funding, the next step will be to successfully complete contract negotiations. In order for a contract to be executed, you must meet certain requirements. Successful proposers will have the opportunity to negotiate some but not all of the contract terms. Federal, state and local laws and/or policies cannot be negotiated. If after negotiations, the proposer cannot accept the terms of the contract clauses, PacMtn reserves the right to retract the award and offer an award to the second highest rated proposal in the same service category and county.

Commencement of Service Delivery

The schedule provided herein allows one month of transition between contract execution and the beginning of the contract period. All contractors must be able to have the proposed program operational on July 1, 2020

Carry-Over Activities

Successful new awardees will assume responsibility for continuing services for customers enrolled by current contractors. Customers who are currently enrolled in a PacMtn WIA Title 1-B funded program and who will not complete their services prior to July 1, 2020 must receive continued services. Customers who exited the program to a job prior to July 1, 2020 may be eligible to receive continued follow-up services.

Customer Data Systems

Contractors are responsible for entering information into the state-managed WorkSource.com system as prescribed by PacMtn. Before being authorized to have access, the contractor’s organization must sign a Memorandum of Understanding (MOU) and Data Sharing Agreement. PacMtn is further considering use of other Customer Relationship Management systems (CRM) and cloud based systems. Users must be approved for access and will be asked to sign a non-disclosure agreement after receiving training.

Indemnification, Insurance & Bonding

Insurance. All contractors shall provide insurance coverage in adequate quantity to protect against legal liability arising out of contractual activities. Acceptable self-insurance is also permitted. Coverage includes:

- Commercial General Liability Insurance minimum limit each Occurrence - $1,000,000;
- General Aggregate - $2,000,000;
- Business Auto Policy - minimum limit of $1,000,000;
- Professional Liability Insurance minimum limits - $300,000 per incident, loss or person.
**Bonding.**

The Contractor shall ensure that every officer, director or employee who is authorized to act on behalf of the Contractor or any subcontractor for the purpose of receiving or depositing funds into program accounts or issuing financial documents, checks, or other instruments of payment for program costs shall be bonded to provide protection against loss.

**Records Retention Policy**

Contractor shall retain all books, records, documents and other material which reflect all direct and indirect costs of any nature expended in the performance of this Contract, including participant data for a period of three (3) years after final payment under this Contract if WIOA funded.

**Additional General Contracting Conditions**

These requirements include, but are not limited to:

1. This RFP does not commit PacMtn to award a contract.

2. No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies under WIOA.

3. All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to PacMtn and be subject to disclosure under the Freedom of Information Act.

4. PacMtn reserves the right to reject any or all proposals received and to negotiate with any and all offers on modifications to proposals.

5. Formal notification to award a contract and the actual execution of a contract are subject to the following: results of negotiations between selected bidders and PacMtn staff, and continued availability of WIOA funds.

6. Any changes to the WIOA program, funding level or board direction may result in a change in contracting. In such instances, PacMtn will not be held liable for what is in the bidder’s proposal or this Request for Proposals package.

7. Proposals submitted for funding consideration must be consistent with, and if funded, operated according to, the WIOA legislation, all applicable federal regulations, State of Washington policies, and PacMtn policies and procedures.

8. Additional funds received by PacMtn may be contracted by expanding existing programs or by consideration of other proposals not initially funded under this RFP. These decisions shall be at the discretion of PacMtn.

9. PacMtn may decide not to fund part or all of a proposal even though it is found to be in the competitive range if, in the opinion of PacMtn, the services proposed are not needed, or the costs are higher than PacMtn finds reasonable in relation to the overall funds available, or if past
management concerns lead PacMtn to believe that the bidder has undertaken services that it cannot successfully carry out.

10. PacMtn may choose not to award a contract to the bidders with lowest cost or highest rating when taking into account other factors.

11. PacMtn is required to abide by all WIOA legislation and regulations. Therefore, PacMtn reserves the right to modify or alter the requirements and standards set forth in this RFP based on program requirements mandated by state or federal agencies.

12. Bidders will be expected to adhere to PacMtn procedures to collect and verify data and submit required monthly reports as well as invoices to PacMtn.

13. All bidders must ensure equal opportunity to all individuals. No individual in the PacMtn area shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any WIOA funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, or political affiliation or belief.

14. All bidders must ensure access to individuals with disabilities pursuant to the Americans with Disabilities Act.

15. Bidders must accept liability for all aspects of any WIOA program conducted under contract with PacMtn. Bidders will be liable for any disallowed costs or illegal expenditures of funds or program operations conducted.

16. Reductions in the funding level of any contract resulting from this solicitation process may be considered during the contract period when a bidder fails to meet expenditure, participant, and/or outcome goals specified in the contract or when anticipated funding is not forthcoming from federal or state governments.

17. Bidders will allow local, state, and federal representatives access to all WIOA records, program materials, staff, and participants. In addition, bidders are required to maintain all WIOA records for three years, beginning on the last day of the program year (29 CFR Part 95).

18. The contract award will not be final until PacMtn and the bidder have executed a mutually satisfactory contractual agreement. PacMtn reserves the right to make an award without further discussion of the proposal submitted. No program activity may begin prior to WDC Board approval of the award and execution of a contractual agreement between the successful bidder and PacMtn.

19. PacMtn reserves the right to cancel an award immediately if new state or federal regulations or policy makes it necessary to change the program purpose or content substantially, or to prohibit such a program.

20. PacMtn reserves the right to determine both the number and the funding levels of contracts finally awarded. Such determination will depend upon overall fund availability and other factors arising during the proposal review process. Bids submitted which are over the maximum amount of funds specified for this RFP will be rejected.
21. The proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged any other individual for the same services performed by the bidder.

22. PacMtn will at its discretion accept proposals with minor clerical errors such as misspellings, incorrect page order or similar in consequential errors.

23. Bidders must accept liability for all aspects of any WIOA program conducted under contract with PacMtn. Bidders will be liable for any disallowed costs or illegal expenditures of funds or program operations conducted.

24. Bidders selected for funding must also ensure compliance with the following, as applicable: U.S. DOL regulations 20 CFR Part 652; 2 CFR part 200: OMB Uniform Administrative Requirements, Cost Principles, and Audit Requirements: and 29 CFR part 93,37,2, and 98.

25. All contractors must have current fiscal and compliance audits as required by law. If findings have been identified, corrections must be made or an action plan must be approved by PacMtn prior to funding. For new contractors, a pre-award survey shall be conducted prior to funding.

26. An authorized official of the contracting agency must sign the proposal. All contractors are required to submit resolutions or other corporate actions, authorized by its Board of Directors, that specify name(s) of the person(s) authorized to obligate the contractor and execute contractual documents, sign checks for the disbursement of funds received by PacMtn, and sign monthly reimbursements.

27. All contractors are ensuring, by signing the contract, that adequate and qualified staff will be dedicated to the contracted program services.

Section V—Appendices

Appendix A: Required Proposal Checklist
Appendix B-1: Cover Sheet
Appendix B-2: Certification
Appendix B-3: Performance Outcomes Form
Appendix B-4: Past/Current Contracts Form
Appendix B-5: Budget Form
Appendix B-6 Acknowledgement of PacMtn Policy and Procedures
Appendix D: Integrated Service Delivery in PacMtn WorkSource System
Appendix E: Basic and Individualized Services in a WorkSource System
Appendix A: Required Proposal Checklist

- Cover Sheet
- Certification
- Program Specific Responses (not to exceed 10 pages single-spaced)
- Financial Accountability/Organizational Capacity (not to exceed 5 pages single-spaced)
- Work Plan/Timeline
- Client Flow Chart
- Performance Outcomes Form
- Past/Current Contracts
- Budget Form
- Acknowledgement of PacMtn WorkSource System and Adult/DW Policy and Procedures
## Appendix B:1 Cover Page

**Organization Name:**

__________________________________________________________________________

**Address:**

__________________________________________________________________________

**City/State/Zip:**

__________________________________________________________________________

**Phone:**

__________________________________________________________________________

**Fax:**

__________________________________________________________________________

**Web address:**

__________________________________________________________________________

**EIN:**

__________________________________________________________________________

**Authorized Representative & Title:**

__________________________________________________________________________  

**Contact Person & Title:**

__________________________________________________________________________

**Address (if different):**

__________________________________________________________________________

**Phone:**

__________________________________________________________________________

**Email:**

__________________________________________________________________________

### Budget Information:

- Total of PacMtn Request: _________________
- Total Project Budget: _________________
- Total Organizational Budget: ________________
## Certification

The information contained in this proposal fairly represents the proposer’s agency, organization, or business and its proposed operating plans and budget. I acknowledge that I have read & understand the requirements of the RFP and am prepared to implement services as specified in this proposal by 7/01/20. I certify that the proposed program services have been designed in compliance with the RFP requirements and WIOA regulations. I also certify that I am authorized to sign this proposal. This proposal is firm for a period of at least ninety (90) days from the deadline for RFP submission.

I affirm that no employee and/or PacMtn Council Member or any officer of any governmental agency has any financial or other interest in this organization.

*Signature of Authorized Representative*

<table>
<thead>
<tr>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
</table>
Appendix B:3 Performance Outcomes Form

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Contact:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td>Email:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERFORMANCE OUTCOMES SUMMARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Clients to be Served:</td>
</tr>
<tr>
<td>Total PacMtn Request:</td>
</tr>
<tr>
<td>Total PacMtn Cost Per Client:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROPOSED PERFORMANCE OUTCOMES (2020-2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults</td>
</tr>
<tr>
<td>Enrollments Basic Services</td>
</tr>
<tr>
<td>Enrollments: Intensive Services</td>
</tr>
<tr>
<td>Enrollments: Training Services ITA</td>
</tr>
<tr>
<td>Exits to Employment Two Quarters after Exit</td>
</tr>
</tbody>
</table>
Appendix B:4 Past and Current Contracts Form

*Information should be provided for at least four current and/or past contracts.*

<table>
<thead>
<tr>
<th>CURRENT CONTRACTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funder</td>
</tr>
<tr>
<td>--------</td>
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<td></td>
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<tr>
<td>Funder</td>
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</tbody>
</table>

Has the organization ever had a contract terminated for cause? Yes _____ No_____. If yes, please provide an explanation.

Has the organization ever been on a contractor performance improvement plan and/or a corrective action plan? Yes______ No_______
Appendix B:5 Budget Form

*Budget-Final award amount has not been established. Anticipated funding range for services is between $1,400,000-$1,600,000.*

<table>
<thead>
<tr>
<th>Accounting Category</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; Wages</td>
<td></td>
</tr>
<tr>
<td>Employee Benefits</td>
<td></td>
</tr>
<tr>
<td>Supplies</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td></td>
</tr>
<tr>
<td>Facilities</td>
<td></td>
</tr>
<tr>
<td>Equipment Rental/Maintenance</td>
<td></td>
</tr>
<tr>
<td>Travel &amp; Training</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Profit</td>
<td></td>
</tr>
<tr>
<td>Indirect</td>
<td></td>
</tr>
<tr>
<td><strong>Total Operating Costs</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Participant Costs</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>WBL Wages</td>
<td></td>
</tr>
<tr>
<td>WBL Benefits</td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
</tr>
<tr>
<td>Support Services</td>
<td></td>
</tr>
<tr>
<td>Participant Other</td>
<td></td>
</tr>
<tr>
<td><strong>Total Participant Costs</strong></td>
<td></td>
</tr>
</tbody>
</table>

| Total Contract                          |       |

For participant costs please detail in the narrative types of services and cost per participant. It is not necessary to budget separately Work Based Learning between WEX, OJT etc., although the narrative should include a description of the types of activities numbers of participants serviced and cost per participant.
Appendix B: 6 Acknowledgment of PacMtn WorkSource System and Adult/Dislocated Worker Policy and Procedures

This is an acknowledgement that ______________________ has read and been informed about the policy and procedure requirements, and expectations of the WIOA Adult and Dislocated Worker Programs and One-stop System. These policy and procedures can be found online at https://pacmtn.org/policies/.

____________________ has reviewed all adult and dislocated worker applicable policies and procedures, and agree to abide by the policy guidelines under the Workforce Innovation and Opportunity Act.

Please read the PacMtn policies and procedures carefully to ensure that you understand all guidance before signing this document.

Authorizing Signer Signature: ________________________________

Authorizing Signer Printed Name: ______________________________

Date: ____________________
## Appendix D: Integrated Service Delivery in PacMtn WorkSource System

<table>
<thead>
<tr>
<th>Current State</th>
<th>Improved Interim State</th>
<th>Desired Future State</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leaders of various programs in the system make decisions in program silos, without coordination across the system.</td>
<td>While leaders for the various programs satisfy their own organizations’ requirements, they work to support staff and increase coordination and communication across the system.</td>
<td>Leaders from the various programs in the system jointly develop and support the implementation of common quality improvement plans that improve outcomes for the entire system; support and celebrate the success of all staff; and jointly use customer input to make all programs successful.</td>
</tr>
<tr>
<td>Leaders are responsible for their own staff, and narrowly focus staffing resources to meet their own program’s needs. Functional leadership is not allowed. Communication about system initiatives often does not reach front line workers. Each partner plans new initiatives and staffing changes without consultation with other partners</td>
<td>Leaders model and strongly encourage collaboration, coordination and team work, but remain responsible for their own staff. Leaders share responsibility for strategic communications and coaching with onsite staff regardless of agency or program. Some leaders allow partners to provide limited functional leadership to multiagency teams, but scope of functional leadership is limited to non-merit staff. Partner initiatives or staffing changes may be are shared before implementation feedback is sought about the impact before implementation.</td>
<td>Leaders model functional responsibility for the system and set an example for staff to follow. They share responsibility for decision-making and oversight of the system. Their individual functional roles within the system are interchangeable depending on demands, priorities, and availability. Leaders and their staff view themselves as being part of a single team. New changes and initiatives are discussed and coordinates across the leadership teams prior to implementation.</td>
</tr>
<tr>
<td><strong>Business</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job seekers are the customer. Business and industry do not see our system as a</td>
<td>All partners understand business is the ultimate customer since the goal of the system is</td>
<td>Meeting business demand is everyone’s job. Business services are integrated into the system. Information about business needs drives program design/job seeker services. Low</td>
</tr>
<tr>
<td>Current State</td>
<td>Improved Interim State</td>
<td>Desired Future State</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>resource. Meeting the workforce needs of the business customer is the responsibility of Business Service Teams, which operate independently of other services, not as part of an integrated service delivery system.</td>
<td>employment. Staff are trained on how to work with business and understand how business services are provided in the system.</td>
<td>unemployment and steady wage progression are hallmarks of the region. Business-responsive services expand business engagement. Business come to the region because they know talent resides here and will be made available to them.</td>
</tr>
<tr>
<td><strong>Partners &amp; Staff</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff in the local System identify with their specific location, organization, and program.</td>
<td>Staff in the local system identify with the system brand, the PacMtn WorkSource/AJC network, rather than focusing on their program identity or location.</td>
<td>Staff in the local system identify with the system brand and are comfortable working in any local WorkSource office. They confer with staff from all programs. Staff act as problem solvers for the local system, not just their program or site. Staff are flexible, accommodating, adaptable and creatively meet the needs of the customer.</td>
</tr>
<tr>
<td>Staff are deployed based on the funding stream that pays for their salaries.</td>
<td>Staff funded with the WIOA Title I and WIOA Title III Wagner Peyser funds work together in functional teams to support job seeker and business customers.</td>
<td>Staff are deployed in functional teams based on their skills, knowledge, abilities, and interests regardless of funding streams, to the greatest extent possible.</td>
</tr>
<tr>
<td>Resources are disjointed and poorly coordinated. For example, staff funded by Title I dedicate resources primarily toward longer term training for about 8% of staff assisted job seekers while staff funded by Title III Wagner Peyser have a limited understanding of training needs/options and focus on immediate employment connections for the majority of customers. Staff and</td>
<td>Staff from all programs are cross-trained to better understand the resources provided by each program. Staff funded by Title I, Title III Wagner Peyser and other programs serve as brokers to identify training and support funds for all customers who need them, including shorter term, on-line, apprenticeship, and other non-seat-based training. Warm hand-offs among programs increase.</td>
<td>Staff from all programs work as a coordinated team, jointly planning how to deploy resources, including staff time, to respond to the highest needs of job seeker and business customer based on trend data (objective reports and customer feedback) and the guidance provided by the PacMtn Workforce Development Council (WDC). All programs jointly set targets and coordinate efforts to increase the number of business and job seeker customers served. All programs set targets together to increase the number and variety of high-quality services available to customers. Non-WIOA resources are leveraged whenever possible in support of these strategies.</td>
</tr>
</tbody>
</table>
### Current State

<table>
<thead>
<tr>
<th></th>
<th>Improved Interim State</th>
<th>Desired Future State</th>
</tr>
</thead>
<tbody>
<tr>
<td>leaders are unclear</td>
<td>Title 1 increases actual participant numbers using same fund amount—lowering the</td>
<td>Staff deploy new service delivery strategies that increase effective services for those customers most in need while also meeting the needs of those customers with lower needs. Services are tailored and packaged in ways to assure the best outcomes for all customers. The gap between number of customers served by Title I and Title III Wagner Peyser resources shrinks.</td>
</tr>
<tr>
<td>about partner programs and</td>
<td>job seekers served by Title 1 resources create high cost per job seeker, while large numbers of job seekers served by Title III Wagner Peyser resources result in a very low cost per seeker.</td>
<td></td>
</tr>
<tr>
<td>services. This lack of</td>
<td>Title 1 increases actual participant numbers using same fund amount—lowering the</td>
<td></td>
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<tr>
<td>understanding creates</td>
<td>cost per job seeker, while large numbers of job seekers served by Title III Wagner</td>
<td></td>
</tr>
<tr>
<td>friction between partner</td>
<td>Peyser resources result in a very low cost per seeker.</td>
<td></td>
</tr>
<tr>
<td>staff.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low numbers job seekers</td>
<td>Staff and resources from Title I funded programs expand the mix of services available</td>
<td>All WorkSource partners clamor to “work” the welcome areas and resource rooms to identify potential customers, tailor services based on the needs of those accessing the sites, and recruit job seekers for business customers. Staff from all programs, to the extent possible, help to bring WorkSource services to the places where people who need those services are present in the community. Service delivery portals increase through connections sites and direct linkages.</td>
</tr>
<tr>
<td>served by Title 1 resources</td>
<td>to customers in the welcome areas and resource rooms. Title III Wagner Peyser funded</td>
<td></td>
</tr>
<tr>
<td></td>
<td>staff are available to support community outreach. Onsite services and outreach increase</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the number of people served and the effectiveness of service of service delivery overall.</td>
<td></td>
</tr>
<tr>
<td>WorkSource welcome areas</td>
<td>Staff and resources from Title I funded programs expand the mix of services available</td>
<td></td>
</tr>
<tr>
<td>and resource rooms are</td>
<td>to customers in the welcome areas and resource rooms. Title III Wagner Peyser funded</td>
<td></td>
</tr>
<tr>
<td>viewed as a WP/ESD funded</td>
<td>staff are available to support community outreach. Onsite services and outreach increase</td>
<td></td>
</tr>
<tr>
<td>function while community</td>
<td>the number of people served and the effectiveness of service of service delivery overall.</td>
<td></td>
</tr>
<tr>
<td>outreach is viewed as a</td>
<td></td>
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<tr>
<td>Title I funded function.</td>
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</tr>
</tbody>
</table>

### Services

<p>| The limited number of workshops are typically assigned, managed and delivered by Title III Wagner Peyser | A team that includes representatives from various partner organizations determines the nature and type of workshops that | A wide range of workshops (including on-line) is developed in real time to meet customer needs, delivered by staff most skilled at delivery and knowledgeable about the topic. Offerings change with changing customer needs, labor market dynamics, industry needs, and |</p>
<table>
<thead>
<tr>
<th><strong>Current State</strong></th>
<th><strong>Improved Interim State</strong></th>
<th><strong>Desired Future State</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>funded staff. Content of workshops is based on staff interest rather than industry need, and no accountability system is in place to ensure relevant of professional delivery. Workshops are infrequently updated, and staff stick to the script, rather than adapting workshops based on customer needs and interests.</td>
<td>customers need and who should deliver and manage them. Limited customer feedback, solicited in passive ways, is occasionally used to increase effectiveness of workshops.</td>
<td>technology. Strong accountability systems are in place to ensure the professional delivery and effectiveness of workshops. Business and job seeker feedback is actively sought and used to improve quality.</td>
</tr>
<tr>
<td>Eligibility for services is tightly managed by staff in program siloes.</td>
<td>All Title I and Title III Wagner Peyser staff have been trained and implement the Co-Registration process for services funded by these two programs.</td>
<td>All customers are provided basic eligibility for a multitude of programs and co-registered in all possible programs for which they are eligible. Support and training resources are used to meet customer need.</td>
</tr>
<tr>
<td>Each program is focused on meeting its own performance targets based on their current customers. Separate outcomes are negotiated for Title I and Title III Wagner Peyser funded programs</td>
<td>All staff are aware of the performance targets for partner programs and have defined some system and site goals that reach across all programs. Title I and Title III funded programs have the same negotiated outcomes, allowing staff funded with these resources to focus on the same goals.</td>
<td>All programs commit to the same performance outcomes for customers, system and site goals, and measure and achieve high levels of customer satisfaction.</td>
</tr>
<tr>
<td>Customers are only served by staff assigned to specific programs. Staff do not feel responsible for customers in other programs. Customers belong to</td>
<td>Information to assist with service delivery is shared among partners from different programs to assure a more seamless customer experience. Customers benefit from</td>
<td>Job seeker and business customers are “everyone’s” customer. While staff play different roles and contribute different resources to achieve customer success, planning for customer services is consultative, collaborative and collegial and information is easily shared with staff from different programs.</td>
</tr>
<tr>
<td><strong>Current State</strong></td>
<td><strong>Improved Interim State</strong></td>
<td>** Desired Future State**</td>
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<tr>
<td>a program, not the system.</td>
<td>multiple programs and staff expertise.</td>
<td>Business and job seeker input drives how services are delivered, when new services/partnerships are needed, and which services to eliminate/change. Customer input is continually collected in active, real time and systematic ways, including focus groups, trained observation, etc. Staff test changes made with customers to assure they have an impact. Customers and staff are continually informed about how input is being used. Business and job seeker customers express high level of satisfaction with system services.</td>
</tr>
<tr>
<td>Customer input is used in a limited way to meet management expectations. Job seeker and business customer input is limited and collected in passive ways, via surveys, input boards and anecdotal customer comments.</td>
<td>Areas where customer input is needed to make changes in the system are identified, and input is solicited for these purposes. Staff from across the system are informed of customer feedback and engaged in identifying potential improvements based on that feedback.</td>
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</table>
| Outreach

Expectations for outreach are set by the leaders of each program and there is little or no coordination of outreach among partners. When a partner conducts outreach it is primarily to bring their own program goals. Some partner programs treat outreach as an add on, while others focus heavily on outreach and have very limited availability at the sites. | All partner programs engage in outreach based on program and system priorities and leaders of the partner programs communicate with each other about outreach efforts and the results of these efforts. Staff at the sites are aware of outreach efforts and how these might impact their work. Staff conducting outreach know enough about the other programs in the system to be able to share information about these. | Outreach is a highly coordinated system function designed to bring services to more customers, especially to customer who have been identified as being underserved by the system. When partners conduct outreach, they are adequately trained to represent the services of the entire system, not just their own program, and to recruit new customer appropriately. Outreach efforts are coordinated with the work at sites so that both on-site and outreach functions are adequately staffed. Partners share the results of outreach and strategize about how best to bring new customers into the system. |
### Appendix E: Basic and Individualized Career Services List

<table>
<thead>
<tr>
<th>Basic Career Services</th>
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</thead>
<tbody>
<tr>
<td>Eligibility determination for adult, dislocated worker, or youth program services, including co-enrolling among these programs</td>
</tr>
<tr>
<td>Outreach, intake, and orientation to the information and other services available through the one-stop delivery system. For the TANF program, States must provide individuals with the opportunity to initiate an application for TANF assistance and non-assistance benefits and services which could be implemented through the provision of paper application forms or links to the application Web site</td>
</tr>
<tr>
<td>Initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs</td>
</tr>
<tr>
<td>Labor exchange services, including job search and placement assistance, career counseling, provision of information on in-demand industry sectors and occupations, provision of information on nontraditional employment</td>
</tr>
<tr>
<td>Appropriate recruitment and other business services on behalf of employers, including small employers, which may include providing information and referral to specialized business services not traditionally offered through the one-stop delivery system</td>
</tr>
<tr>
<td>Referrals to and coordination of activities with other programs and services, including program and services inside and outside WorkSource</td>
</tr>
<tr>
<td>Workforce and labor market employment statistics information, including accurate information relating to local, regional, national labor market areas, including job vacancy listings in labor market areas; information on job skills necessary to obtain the jobs; and information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for such occupations</td>
</tr>
<tr>
<td>Performance and program cost information on eligible training providers and eligible providers of youth workforce investment activities, providers of adult education, providers of career and technical education activities at the postsecondary level, and career and technical education activities available to school dropouts, and providers of vocational rehabilitation (NOTE: This information will be provided to the site. The site’s responsibility is to make this information available to the public)</td>
</tr>
<tr>
<td>Information in formats that are usable by and understandable to one-stop customers, regarding how the local area is performing on the local performance accountability measures and any additional performance information with respect to the one-stop delivery system in the local area (NOTE: This information will be provided to the site. The site’s responsibility is to make this information available to the public)</td>
</tr>
<tr>
<td>Information in formats that are usable by and understandable to one-stop customers, relating to the availability of supportive services or assistance including: child care; child support; medical or child health assistance benefits under SNAP; earned income tax credit; TANF; other and supportive and transportation services provided through funds made available in the local area (NOTE: This information will be provided to</td>
</tr>
</tbody>
</table>
## Basic Career Services

The site's responsibility is to update this information with any site-specific additions, and to make this information available to the public.

- Assistance in establishing eligibility for financial aid assistance for training and education programs not provided under WIOA
- Translation services

## Individualized Career Services

- Comprehensive and specialized evaluation to identify barriers to employment and employment goals
- Development of individual employment plan (IEP)
- Group counseling and/or mentoring
- Individual counseling and/or mentoring
- Career/vocational planning
- Short-term pre-employment/pre-vocational services
- Internships/work experiences
- Workforce preparation activities
- Financial literacy services
- Out-of-area job search and relocation assistance
- English language acquisition and integrated education and training programs
- Follow-up services