

REQUEST FOR PROPOSAL

Services Provider:
WIOA Adult Services Serving Priority Populations

Release Date: February 24, 2020

Bidder's Conference: March 12, 2020 10 am - 12 pm

Due Date: April 6, 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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contracts@pacmtn.org

www.pacmtn.org

PacMtn is an Equal Opportunity employer/program.

Auxiliary aids and services are available upon request to individuals with disabilities. WA Relay 711

Table of Contents

<i>Section I</i>	3
Introduction	3
Identified Priority Populations:	3
Solicitation and Contract Period	3
RFP Goals	4
A. Integrated, Region-Wide Service	5
B. Priority Industry Sectors and Career Pathways	5
C. Technology and Accessibility	6
D. Universal Access across the Workforce System.	6
<i>Section II</i>	7
Eligible Organizations	7
Policy of Competition	7
RFP Key Events & Dates	7
Bidders Conference	8
Questions and Answers	8
Proposal Submittal	8
Evaluation of Proposals & Award of Contract.....	10
Proposal Review	10
Evaluation Criteria	10
Determination of Cost/Price Reasonableness.....	11
Award of Contract	11
Appeal Process	11
Acknowledgements	11
Career Services	12
Individualized Career Services	12
Follow-Up Services.....	12
Training Services.	13
Performance Measures.....	13
<i>Section III</i>	13
General Proposal Elements – Program Services Plan.....	13
General Proposal Elements – Financial Accountability/Organizational Capacity	14
<i>Section IV</i>	15
General Terms & Conditions	15

Commencement of Service Delivery	15
Carry-Over Activities.....	15
Customer Data Systems.....	16
Indemnification, Insurance & Bonding	16
Insurance	16
Bonding	16
Records Retention Policy	16
Additional General Contracting Conditions	16
<i>Section V—Appendices</i>	18
Appendix A: Required Proposal Checklist.....	19
Appendix B1: Cover Page.....	20
Appendix B2: Certification	21
Appendix B3: Performance Outcomes Form	22
Appendix B4: Budget Form	23
Appendix B5: Past and Current Contracts Form.....	24
Appendix B6: Acknowledgment of PacMtn WorkSource System and Adult/Dislocated Worker Policy and Procedures	26
Appendix C: Integrated Service Delivery in PacMtn WorkSource System	27
Appendix D: Basic and Individualized Career Services List	33

Section I

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.

Through an integrated, job-driven public workforce system WIOA creates an extraordinary opportunity to improve job and career options for workers, jobseekers and participants. When we link diverse talent to businesses and meet their workforce needs we create opportunity for all parties. WIOA focuses on serving individuals experiencing the most significant barriers to employment and career growth. In PacMtn, communities of individuals experiencing similar and/or intersecting barriers are termed *Priority Populations*. As the administrative/fiscal agent for workforce development programs in this region, PacMtn is soliciting service providers to deliver WIOA Adult program services for:

Designated Priority Populations that are unemployed, under-employed, or in need of training and career services;

Identified Priority Populations:

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

- ✦ Individuals with disabilities, both youth and adults
- ✦ Recipients of Public Assistance
- ✦ Homeless Individuals
- ✦ Adult and youth ex-offenders (Justice-involved/Re-entry)
- ✦ Veterans

For the purposes of this RFP PacMtn has determined the highest and best use of funds will be awarded to those serving at least one of the priority populations below:

- ✦ Homeless Individuals
- ✦ Individuals with disabilities, both youth and adults
- ✦ Adult and youth ex-offenders (Justice-involved/re-entry)

PacMtn anticipates up to \$300,000 of WIOA Adult funding will be allocated for these Priority Populations from July 1, 2020 through June 30, 2021.

Solicitation and Contract Period

One or more contracts will be awarded pursuant to this Request for Proposal (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 PacMtn discretion.

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

The Pacific Mountain Workforce Development Council is issuing this RFP for respondents with applicable experience providing services to the aforementioned and additional priority populations. Respondents should be organizations with experience providing barrier removal and case management services to: justice-involved individuals, individuals that are housing insecure, and individuals with disabilities.

RFP Goals

This work aligns itself with **PacMtn Mission, Vision and Values**. Please find those commitments [here](#). In addition to these organizational commitments PacMtn conducts its work in a particular way, including dedication to:

1. Integrated, high-quality service delivery
2. Welcoming vulnerable populations previously left at the margins
3. Prioritizing excellence in customer service and experience
4. Active involvement with and engagement with other system and community partners and contractors
5. Accessible, open and flat organizational structures
6. Straight truth talk with recognition of differences and accountabilities
7. Respect, inclusion and collegiality with all partners across the system

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.

WorkSource offers an integrated one-stop career system, co-locating partners to provide a vast array of services for customers and leveraging resources made available under one roof. WorkSource also acknowledges that, because funding and available resources are limited, populations with significant or multiple barriers to employment should receive priority and be assured opportunity and access. In the spirit of this fact, WorkSource recognizes that sometimes increasing access means meeting customers where they are by taking workforce services into the community where those underserved populations are already being served with other existing and aligned programming.

Preparing a labor force that is ready to meet the needs of the business community is critical to building prosperity for individuals, the community and the economy of the region. This solicitation represents PacMtn's strategic investment in actions aimed to reduce poverty and to provide access to those individuals and groups dramatically impacted by poverty. With this award PacMtn will:

- Enhance services and attention for special and targeted populations that address equity in service and access
- Create strong sector led presence in all counties served
- Build employer trust
- Establish an effective outreach plan
- Leverage partnerships and provide a "collective impact" response to local workforce challenges

- Be accountable and responsible for outcomes and proper use of funds
- Implement the federal legislation and stay fully compliant with the Opportunity Act

Priority services for people with significant barriers to employment is important because within five years, the public and private sector workforce will see:

- A growing number of retirements from our predominantly mature workforce
- Increased competition for highly skilled employees
- Increased demand for organization services
- Continuing financial challenges for individuals and families

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 in an adaptive and creative manner. The successful respondent(s) will work with PacMtn and other partners to achieve:

A. Integrated, Region-Wide Service

PacMtn has established WorkSource offices throughout the region. The successful respondent is expected to become familiar with the services available at sites and to seamlessly refer customers back and forth to these WorkSource sites:

- 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
- 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

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, media, utilities, professional services and construction are forecast 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 careers on 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.

PacMtn Priority Career Pathways include:

- Construction Laborers/Management
- Utility and Highway Maintenance Worker
- Frontline and Administrative Healthcare Support
- Social Services and Healthcare Support
- Retail and Customer Service
- Business
- Admin and Office Support
- Food Preparation and 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 activities might include:

- Ensuring that students and job-seekers can obtain and make use of career pathway information
- Participation 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

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/>

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.

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

PacMtn encourages organizations to collaborate on the proposal and development of service provision. 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 each will provide, and how funding will be shared and what other leveraged funds will 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

Request for Proposals Issued	February 24, 2020
Bidder’s Conference- 10 AM to Noon	March 12, 2020
Deadline for Receipt of Questions, 4:00 PM (Pacific Time)	March 23, 2020
Deadline for Receipt of Proposals, 4:00 PM (Pacific Time)	April 6, 2020
Formal Review Process of Proposals Begins	April 7, 2020
Interviews	To be scheduled; between April 22 and April 23

Successful Bidders Posted on Website	No later than May 11, 2020
Contract and Budget Negotiations Begin with Successful Bidder *following mandatory appeals period	Week of May 25, 2020
Contract Start Date	July 1, 2020

**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 and potential bidders are highly encouraged to attend:

Date: March 12, 2020
Time: 10:00 a.m. to Noon
Location: Pacific Mountain Workforce Development Council
1570 Irving St. SW
Tumwater, WA

Questions and Answers

Questions asked at the bidders' conference, together with answers to those questions, will be posted online at <https://pacmtn.org/service-provider-opportunities/>. Bidders can access the Public Q & A document by clicking on the "+" symbol below the relevant RFP title. In addition, questions about the RFP may be sent to contracts@PacMtn.org by March 23, 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, and PacMtn encourages all bidders to do so frequently.

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. Program Specific Questions (not to exceed 7 pages single-spaced)
 - o Program Services Work Plan/Timeline
 - o Service Delivery Flowchart
- D. General and Financial Questions (not to exceed 3 pages single-spaced)
- 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:

- Three hard copy original proposal signed in blue ink
 - 8 1/2" X 11" white bond paper, single-sided
 - 1" margins, 12 point font, single 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 April 6, 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 submitted if the hard copy is post marked no later than April 6, 2020 . Proposals not received electronically by the due date and no hard copy is provided by the 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.

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	40%
Financial Accountability	15%
Organizational Capacity	25%
**Innovations in Service Delivery	20%

**Innovations in Service Delivery is defined by the approach, resources and strategy a respondent brings in implementing the adult program's required elements. Bidders must describe applicable experience in workforce development and/or serving specific priority populations. Bidders should be expected to provide evidence of the organization's ability to successfully perform the services described in this RFP, including descriptions of past projects completed with a similar scope of work and/or other deliverables.

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 April 22, 2020-April 23, 2020 if needed to clarify elements in the proposals. Following evaluation by the Review Panel, and including any interviews, a recommendation for award will be forwarded to the PacMtn Council.

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, Chief Executive Officer
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.

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 Priority Populations Scope of Work

The goal of providing Adult Workforce Services for priority populations is to support career advancement and income mobility by helping those with barriers to employment improve and develop high-demand skills. All adults may be enrolled and evaluated for service delivery potential. Adults are eligible to receive career services if the individual is at least eighteen (18) years of age and is enrolled in WIOA Adult Services. 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 is not 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.

Please respond to how the following services and programming will be provided in an adaptive and creative manner.

Career Services. Basic career services are available to adults 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. Recent previous assessments by partner programs can be used and is encouraged 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 workplace 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;
- Post-program support services have been needed; and/or

- Program follow-up services needed.
- Employed or self-employed after the first, second, or third quarter exit;
- An exit exclusion has occurred;

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

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 Performance Measures

Adult Performance Measure	
PERFORMANCE METRIC - ADULT	Target
Entered Employment - # of participants who are employed in (Q2) Post-Exit	67.1%
Employment Retention - # of participants who are employed in (Q4) Post-Exit	66.4%
Average Earnings - Median earnings (Q2) Post-Exit	\$5,036
Credential Attainment Rate - Participants Obtaining a Post-Secondary Credential or Secondary School Diploma/Equivalent (During Participation or Within 1 Year of Exit)	63.4%

Section III

General Proposal Elements – Program Services Plan

Please limit responses to seven (7) pages (single spaced).

Provide a program services plan that describes your strategy to provide Adult program services to priority populations in an integrated service delivery system. This could be either operating in the WorkSource offices, or with *direct linkage* to the WorkSource Offices. *Direct linkage* is defined in PacMtn WorkSource System Policy as providing a direct connection within a reasonable time, by phone or through a real-time Web-based communication, to a program staff member who is not located at the site who can provide program information or services, including career services, to the customer. Solely

providing a phone number, Web Site, information, pamphlets or materials does not constitute direct linkage (TEGL 16-16). Specifically:

1. How will your organization serve the proposed priority population in the WorkSource system?
2. How will you leverage and coordinate other community services?
3. Describe the experience and demonstrated commitment your organization has serving the priority populations identified as priority by the PacMtn Priority Populations Committee.
4. Adult Case Management Plan—Describe in your Narrative how you will recruit, provide case management, individualized career services and achieve the goals of PacMtn. Explain how you will outreach and provide service to priority populations across the PacMtn region.
5. Describe the organization’s experience working with economically disadvantaged adults and providing the following:
 - a. Individualized career services, supportive services and training (Individualized Training, On-The-Job Training, Business Internships, Customized Training, etc.)
 - b. Assessing customer skills and needs
 - c. Developing and Maintaining and Individualized Employment Plan
6. How will your organization collaborate with other Workforce related programs like: Rapid Response Activities, Youth, WorkFirst, and other demonstration projects focused on priority populations
7. How will you support peer-to-peer learning and empower individuals to help others similarly impacted?

PacMtn understands that it is not feasible for the WorkSource and the One-Stop System to address every need the participant has. Proposals should explain their approach to working with existing partners and forming partnerships within the region to connect participant to a broader array of wrap-around services. Respondents shall describe how they will connect with organizations (such as substance use counseling, mental health services, housing services, volunteers, training programs, etc.) to aid program participant in barrier removal.

General Proposal Elements – Financial Accountability/Organizational Capacity

Please limit responses to three (3) pages, not including attachments.

1. Describe staff qualifications/experience and key staff members’ length of service in the areas of priority populations. Provide specific examples of the staff’s creativity and flexibility in resolving barriers to employment for priority populations.
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. Explain methodology or process in how budget proposals were generated. Explain your evaluation of how you determined equity in assigning resources to each area.
5. 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.
6. Describe your experience in administration and contract management.
7. 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

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 Page

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 C: Integrated Service Delivery in PacMtn WorkSource System

Appendix D: Basic and Individualized Services in a WorkSource System

Appendix A: Required Proposal Checklist

- Cover Sheet
- Certification
- Program Specific Responses (not to exceed 7 pages single-spaced)
- Work Plan/Timeline
- Client Flow Chart
- Financial Accountability/Organizational Capacity (not to exceed 3 pages single-spaced)
- Performance Outcomes Form
- Budget Form (with documentation of Leveraged Resources and Sustainability)
- Past/Current Contracts
- Acknowledgement of PacMtn WorkSource System and Adult/DW Policy and Procedures

Appendix B1: 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: _____

Appendix B2: Certification

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

Signature

Date

Appendix B3: Performance Outcomes Form

Organization Name:	
Fiscal Contact:	Title:
Phone:	Email:

PERFORMANCE OUTCOMES SUMMARY	
Total Clients to be Served:	
Total PacMtn Request:	
Total PacMtn Cost Per Client:	

PROPOSED PERFORMANCE OUTCOMES (2020-2021)	
Adults	
Enrollments Basic Services	
Enrollments: Intensive Services	
Enrollments: Training Services ITA	
Exits to Employment Two Quarters after Exit	

Appendix B4: Budget Form

Accounting Category	Total
Salaries & Wages	
Employee Benefits	
Supplies	
Communications	
Facilities	
Equipmental Rental/Maintenance	
Travel & Training	
Other	
Profit	
Indirect	
Total Operating Costs	
Participant Costs	
WBL Wages	
WBL Benefits	
Training	
Support Services	
Participant Other	
Total Participant Costs	
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 B5: Past and Current Contracts Form

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

CURRENT CONTRACTS				
Funder	Contract Amount	Start/End Dates	Funder Contact	Outcomes Achieved to Date

PAST CONTRACTS				
Funder	Contract Amount	Start/End Dates	Funder Contact	Outcomes Achieved

Has the organization ever had a contract terminated for cause? Yes ____ No ____
 If yes, please provide an explanation including brief details of who the funder was, the value of the contract, stated reasons for the termination.

Has the organization ever been on a contractor performance improvement plan and/or a corrective action plan? Yes _____ No _____
 If yes, please provide an explanation including brief details of who the funder was, the value of the contract, stated reasons for the performance improvement plan and the outcomes of the action.

Appendix B6: 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 Worker Programs and One-stop System. These policy and procedures can be found online at <https://pacmtn.org/policies/>.

_____ has reviewed all adult 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 Signature: _____

Authorizing Printed Name: _____

Date: _____

Appendix C: Integrated Service Delivery in PacMtn WorkSource System

PacMtn WDC certifies the WorkSource delivery system. The following chart was developed to offer guidance to the system as it proceeded through the certification process. This information offers important insight into the status of work systems, current realities and aspirations of this local workforce system.

Current State	Improved Interim State	Desired Future State
Leadership		
<p>Leaders of various programs in the system make decisions in program silos, without coordination across the system.</p>	<p>While leaders for the various programs satisfy their own organizations' requirements, they work to support staff and increase coordination and communication across the system.</p>	<p>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.</p>
<p>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</p>	<p>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 shared before implementation feedback is sought about the impact before implementation.</p>	<p>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.</p>

Current State	Improved Interim State	Desired Future State
Business		
<p>Job seekers are the customer. Business and industry do not see our system as a 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.</p>	<p>All partners understand business is the ultimate customer since the goal of the system is employment. Staff are trained on how to work with business and understand how business services are provided in the system.</p>	<p>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 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.</p>
Partners & Staff		
<p>Staff in the local System identify with their specific location, organization, and program.</p>	<p>Staff in the local system identify with the system brand, the PacMtn WorkSource/AJC network, rather than focusing on their program identity or location.</p>	<p>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.</p>
<p>Staff are deployed based on the funding stream that pays for their salaries.</p>	<p>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.</p>	<p>Staff are deployed in functional teams based on their skills, knowledge, abilities, and interests regardless of funding streams, to the greatest extent possible.</p>
<p>Resources are disjointed and poorly coordinated. For example, staff funded by Title I dedicate resources primarily toward longer term training for about 8%</p>	<p>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</p>	<p>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</p>

Current State	Improved Interim State	Desired Future State
<p>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 leaders are unclear about partner programs and services. This lack of understanding creates friction between partner staff.</p>	<p>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.</p>	<p>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.</p>
<p>Low numbers 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.</p>	<p>Title 1 increases actual participant numbers using same fund amount—lowering the cost per. Title III Wagner Peyser offers stronger access to and support for no cost training programs and possibilities. Services to customers meeting Title I training eligibility increase. Staff from both programs work together to leverage resources and services to improve customer satisfaction.</p>	<p>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.</p>
<p>WorkSource welcome areas and resource rooms are viewed as</p>	<p>Staff and resources from Title I funded programs expand the mix of</p>	<p>All WorkSource partners clamor to “work” the welcome areas and resource rooms to identify potential customers, tailor services based on the</p>

Current State	Improved Interim State	Desired Future State
<p>a WP/ESD funded function while community outreach is viewed as a Title I funded function.</p>	<p>services available to customers in the welcome areas and resource rooms. Title III Wagner Peyser funded staff are available to support community outreach. Onsite services and outreach increase the number of people served and the effectiveness of service of service delivery overall.</p>	<p>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.</p>
Services		
<p>The limited number of workshops are typically assigned, managed and delivered by Title III Wagner Peyser 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.</p>	<p>A team that includes representatives from various partner organizations determines the nature and type of workshops that customers need and who should deliver and manage them. Limited customer feedback, solicited in passive ways, is occasionally used to increase effectiveness of workshops.</p>	<p>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 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.</p>
<p>Eligibility for services is tightly managed by</p>	<p>All Title I and Title III Wagner Peyser staff have been trained and</p>	<p>All customers are provided basic eligibility for a multitude of programs and co-registered in all possible programs for which they are eligible.</p>

Current State	Improved Interim State	Desired Future State
staff in program siloes.	implement the Co-Registration process for services funded by these two programs.	Support and training resources are used to meet customer need.
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	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.	All programs commit to the same performance outcomes for customers, system and site goals, and measure and achieve high levels of customer satisfaction.
Customers		
Customers are only served by staff assigned to specific programs. Staff do not feel responsible for customers in other programs. Customers belong to a program, not the system.	Information to assist with service delivery is shared among partners from different programs to assure a more seamless customer experience. Customers benefit from multiple programs and staff expertise.	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.
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	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	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

Current State	Improved Interim State	Desired Future State
and anecdotal customer comments.	improvements based on that feedback.	seeker customers express high level of satisfaction with system services.
Outreach		
<p>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 meet 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.</p>	<p>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.</p>	<p>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.</p>

Appendix D: Basic and Individualized Career Services List

Basic Career Services
Eligibility determination for adult, dislocated worker, or youth program services, including co-enrolling among these programs
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
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, career counseling, provision of information on in-demand industry sectors and occupations, provision of information on nontraditional employment
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
Referrals to and coordination of activities with other programs and services, including program and services inside and outside WorkSource
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
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 <i>(NOTE: This information will be provided to the site. The site's responsibility is to make this information available to the public)</i>
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 <i>(NOTE: This information will be provided to the site. The site's responsibility is to make this information available to the public)</i>
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 <i>(NOTE: This information will be provided to the site. The site's responsibility is to update this information with any site-specific additions, and to make this information available to the public)</i>
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

