

REQUEST FOR PROPOSALS

WIOA Title Ib Adult/Dislocated Worker/Youth Services

Released by:

Pacific Mountain Workforce Development Council

Release Date: March 11, 2022

Due Date: April 1, 2022, 4:00pm PST

Proposed Contract Period:

July 2022—June 2023

**With mutually agreed option for annual extension to June of
2026**



building community prosperity

Pacific Mountain Workforce Development Council

1570 Irving Street Tumwater, WA 98512

Phone: 360-704-3568 Fax: 360-704-6444

contracts@pacmtn.org

www.pacmtn.org

The Pacific Mountain Workforce Development Council is an Equal Opportunity Employer and provider of employment and training services. Auxiliary aids and services are available upon request by persons of disability. Washington Relay Service 7-1-1

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Section I

Introduction

The Pacific Mountain Workforce Development Council (PacMtn) is requesting proposals from qualified professional vendors to deliver services to:

- **Adult and Dislocated Workers** who are unemployed, under-employed, or in need of training and career services
- **Youth** ages 16-24 who are both in-school and out-of-school who need assistance launching on a pathway to economic prosperity and stability

Background Information

PacMtn is a Washington State 501 (c) (3) nonprofit corporation responsible for the administration and finances of the federal Workforce Innovation and Opportunities Act programs. PacMtn operates within Grays Harbor, Lewis, Mason, Pacific, and Thurston counties. The administrative offices are located at Thurston County WorkSource, located at 1570 Irving St SW, Tumwater, WA 98512. Additional information about PacMtn is available on our website at <https://pacmtn.org/about/>.

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 workforce development 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 is characterized by three critical hallmarks of excellence:

- Ensuring that workforce solutions are driven by the needs of workers and employers;
- Requiring that One-Stop Career Centers (locally referred to as WorkSource Centers) provide excellent, integrated customer service to both job seekers and employers, committing to continuous improvement driven by customer voice; and
- Maintaining an understanding of the workforce system as a critical component of creating strong regional economies, and that it plays an active role in community development.

As stated by Washington State Governor Jay Inslee, “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 workers it needs to grow and prosper in our state.”

Provision of services specified in this RFP requires substantive knowledge and understanding of WIOA law and all applicable regulations and 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, as these policies and regulations are constantly evolving. For more information on WIOA, its implementing regulations and any other information of interest, please visit <http://www.doleta.gov/wioa/>.

Project Scope and Conditions

In attaining the overarching goals of implementing WIOA services, there are specific areas to which attention must be given based on PacMtn local goals and best practices. Responses to this RFP should address how the respondent intends to achieve or participate in the following areas in an adaptive and creative manner. The successful respondent(s) will work with PacMtn WDC and other partners to achieve the following:

A. Region-Wide Service

PacMtn represents five counties within its region, and it is critical that WIOA contracted subrecipients ensure equitable investment of time and resources allotted under WIOA contracts to each of the five counties respectively. This must include development of partnerships and engagement with communities in each county, and also requires participation at each PacMtn region WorkSource office. PacMtn WDC has established WorkSource offices in the following locations:

- 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

In addition to WorkSource offices, PacMtn has also established many WorkSource Connection Sites. Connection sites provide devices and internet access capable of utilizing www.worksourcewa.com, videoconferencing, online training videos and programs, etc.. Connection sites are also opportunities for more community integration and access to services in the more rural areas of the PacMtn region. PacMtn region WorkSource Connection sites are:

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

B. Integrated Services

The One-Stop Career System is designed to focus on integrated service delivery. Contracted subrecipient staff must be capable of providing flexible and accessible services driven by customer need rather than eligibility. This integration might include a mix of basic and intensive career services, and often calls for co-enrollment across multiple programs, leveraged budgets to provide adequate support, training, and work-based learning services to meet employment pathway outcomes. The expectation for integrated service delivery is that, regardless of record-keeping and technical components of eligibility and program enrollment(s), the customer-facing

result is seamless, accessible, relevant, and individualized career services. Additional considerations regarding integrated service delivery include:

- **Support of Functional Teams**—Staff employed by various partners are organized into functional teams based on their system roles, interests, and knowledge rather than by employer. Using this functional design for services reduces unnecessary steps to provide services and creates a warm and meaningful customer interaction.
- **Common Outcomes**—Every One-Stop Career Center partner is held accountable to shared, common outcomes, meaning they are all working toward the same goals and outcomes for system customers. These common measures are used to evaluate system-wide performance, to which every partner is accountable as described in WIOA law.
- **Voice of the Customer**—All WorkSource partners and staff will be engaged in gathering and using customer input (job seeker and employer) to continuously improve services.

C. Alignment of Priority Industry Sectors and Career Pathways

PacMtn has prioritized certain industry sectors as the focus of service strategies under 2022-2023 contracts. Healthcare, social services, technology support services, media, utilities, business administration, professional services, retail, food preparation, restaurant services, and construction are forecasted to be the region’s fastest-growing industries over the next decade. These industries were identified in the 2022 PacMtn Industry Cluster Study and have been validated by regional sector engagement and labor market analysis.

The contracted subrecipient 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 in these pathways. The contracted subrecipient 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.

Career Pathways aligned with Industry Sectors of focus 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, designing, and planning individual and/or cohort-based 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 regionaleconomy and employment, refer to: <https://pacmtn.org/local-economy/sectors/>

D. Technology and Accessibility

The use of technology to increase accessibility of One-Stop Career Centers and services is an essential part of service delivery under all PacMtn WIOA contracts. This priority speaks to ensuring customers have access to the internet and internet capable devices, and also requires contracted subrecipient staff to be qualified and prepared to provide virtual services as needed to ensure customers region-wide can all benefit from One-Stop Career Centers and services. Utilizing technology allows for seamless, universal, and remote access to education, training, and other workforce development services. While technology cannot fix all barriers to access, problems, in many cases it alleviates staff time and energy to be spent addressing more significant barriers.

PacMtn has grown and maintained a strong partnership with Timberland Regional Library, increasing 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.

E. Universal Access Across the Workforce System

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 15 populations designated as “populations with barriers” under WIOA. The populations with significant or multiple barriers to employment should receive priority for services.

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—considering 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.

F. Identified Priority 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:

- (a) Displaced homemakers (as defined in WIOA sec. 3(16));
- (b) Low-income individuals (as defined in WIOA sec. 3(36));
- (c) Indians, Alaska Natives, and Native Hawaiians (as defined in WIOA sec. 166(b));
- (d) Individuals with disabilities, including youth who are individuals with disabilities (as defined in WIOA sec. 3(25) (includes individuals who are in receipt of Social Security Disability Insurance);
- (e) Older individuals (age 55 and older) (as defined in WIOA sec. 3(39));
- (f) Ex-offenders (“offender” as defined in WIOA sec. 3(38));
- (g) Homeless individuals or homeless children and youths (see Attachment III);
- (h) Youth who are in or have aged out of the foster care system;
- (i) Individuals who are:
 - English language learners (WIOA sec. 203(7));
 - Individuals who have low levels of literacy (an individual is unable to compute or solve programs, or read, write, or speak English at a level necessary to function on the job, or in the individual’s family, or in society); and
 - Individuals facing substantial cultural barriers;
- (j) Eligible migrant and seasonal farmworkers (as defined in WIOA sec. 167(i)(1-3);
- (k) Individuals within two years of exhausting lifetime TANF eligibility;\
- (l) Single parents (including single pregnant women);
- (m) Long-term unemployed individuals (unemployed for 27 or more consecutive weeks); and
- (n) Such other groups as the Governor involved determines to have barriers to employment

The PacMtn Priority Populations Committee determined the populations that are Priority for 2021-2023 are:

- Individuals with disabilities, both youth and adults
- Homeless individuals
- Veterans
- Individuals over the age of 45
- English Language Learners (or limited English proficient)
- Broadband/Technology Limited

Section II

Contract Term

One provider will be selected for the full scope of work described in this RFP. The beginning contract date will be on July 1, 2022. The WDC may also elect to award additional one-year contracts pursuant to this RFP for the years beginning July 1, 2023, July 1, 2024, July 1, 2025, and July 1, 2026. Additional annual awards shall be contingent upon successful performance, funding levels and the discretion of PacMtn.

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 will fulfill the procurement review responsibilities with complete impartiality and without preferential treatment to any response.

Questions and Answers

Questions regarding this RFP can be sent to contracts@pacmtn.org. Please specify this RFP by its title when submitting questions. Questions and the answers will be posted on our website so every Bidder can review. Questions will be accepted through March 28, 2022 at 4:00pm PST.

Instructions for Submission

Proposals must be submitted by electronic mail by April 1, 2022 at 4:00pm PST. Due to the size of electronic files, use Drop Box to send proposals by using the following link:
<https://www.dropbox.com/transfer>

- Click the "Upload Files" button;
- Select the files you would like to upload;
- Click on "Email"
- Enter the following email address: contracts@pacmtn.org ;
- Add a message: "Your Organization Name - WIOA Title Ib RFP"
- Click "Send Transfer" button
- Login to your Dropbox account or create a free account
- Click "Send Transfer" button

Uploads should include all indicated appendices formatted as described in Section III. A Microsoft Word version of blank appendices will be available on the PacMtn website at:
<https://pacmtn.org/investments/service-provider-opportunities/>

Bidders may upload all required documents as single pdf files (labeled appropriately) or as a

single pdf at their own discretion.

Additional attachments are allowed as appendices at bidder’s discretion. Additional attachments will not be scored for points, but will be observed by review committee members to illustrate bidders’ alignment with PacMtn Mission, Vision, and Values, and the expectations outlined in Section I.

Key Dates and Events

Request for Proposals Issued	March 11, 2022
Bidders’ Conference- 10:00am-11:30am PST	March 18, 2022
Deadline for Receipt of Questions, 4:00 PM PST	March 28, 2022
Deadline for Receipt of Proposals, 4:00 PM PST	April 1, 2022
Formal Review Process of Proposals Begins	April 4, 2022
Interviews for Highest Scoring Proposals	Anticipated April 18-19, 2022
Announcement of Successful Bidder(s)	April 22, 2022
Appeals Window	April 22-28, 2022
Contract and Budget Negotiations Begin with Successful Bidder *following mandatory appeals period	Anticipated Week of April 25, 2022
Transition Period for Contract Start-up	May and June, 2022
Contract Start Date	July 1, 2022

Evaluation and Selection Criteria

Proposals will be evaluated based on the following criteria:

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

Following evaluation by a PacMtn Staff Review Committee, a PacMtn External Stakeholder Review Committee, and including any interviews, a recommendation will be forwarded to the PacMtn Council

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 vendor(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 vendor(s) to:

William Westmoreland, 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. Information on the appeals process will be available on the PacMtn website listed with other resources for this RFP.

Miscellaneous

1. PacMtn will select the proposal which is most qualified to provide the services which will achieve the overall objectives of this Proposal Request.
2. PacMtn reserves the right to make such investigation as it deems necessary to determine the ability of proposers to furnish the required services, and proposers shall furnish all such information for this purpose as PacMtn may request.
3. PacMtn reserves the right to reject any proposals for failure to meet the requirements contained herein, to waive any technicalities, and to select the proposal which, in PacMtn's sole judgment, best meets the project requirements.
4. PacMtn reserves the right to reject, or to seek modifications of any proposal offered if in PacMtn's sole discretion the proposal does not meet the overall RFP objectives.
5. PacMtn reserves the right to offer an award to the next 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.
6. This Proposal Requests 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.
7. The RFP creates no obligation on the part of PacMtn to award a contract or to compensate the proposer for any costs incurred. PacMtn reserves the right to award a contract based upon proposals received without further discussion or negotiation. Proposers should not rely upon the opportunity to alter their qualifications during discussions.
8. 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.

9. Proposals that are not funded will not be returned.

Section III

Proposal Format

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 packets shall include:

- Appendix A: Appendices Checklist
- Appendix B: Cover Sheet and Certification
- Appendix C: General and Financial Questions (not to exceed 5 pages single-spaced)
- Appendix D: Service Delivery Questions (not to exceed 15 pages single-spaced)
- Appendix E: Performance Outcomes Form
- Appendix F: Program Budget Form
- Appendix G: Past/Current Contracts Form
- Appendix H: Acknowledgement of PacMtn WIOA Program Policy
- Appendix K: Budget Narrative
- Appendix J: Most Recent Financial Audit (if available)
- Appendix K: Copy of Approved Cost Allocation Plan or Written Policy/Procedures (if available)

Additional attachments may be added, labeled as appendices, at the bidder's discretion. Additional attachments will not be awarded extra points, but may be used to further illustrate the proposal's alignment with PacMtn Mission, Vision, and Values, and to evidence or validate the proposal's claims and responses.

Proposals should be submitted electronically with the following format requirements:

- 8 1/2" X 11" page size with 1" margins
- 11-point Arial or Calibri font
- Single Spaced

Proposals are April 1, 2022 by 4:00pm. Deliver via email to contracts@pacment.org. Proposals are not considered delivered without a response from PacMtn contracts email confirming receipt. Proposals not received electronically by the due date automatically disqualified from competition – no exceptions. Faxed proposals will not be accepted.

Section IV

General Terms and 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, 2022

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 WIOA Title 1-B funded program and who will not complete their services prior to July 1, 2022 must receive continued services. Customers who exited the program to a job prior to July 1, 2022 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, or against beneficiaries on the basis of either citizenship status or participation in any WIOA Title I financially assisted program or activity.
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 inconsequential 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 and Supplemental Questions

Appendix A: Required Proposal Checklist

- Appendix A: Appendices Checklist
- Appendix B: Cover Sheet and Certification
- Appendix C: General and Financial Questions (not to exceed 5 pages single-spaced)
- Appendix D: Service Delivery Questions (not to exceed 15 pages single-spaced)
- Appendix E: Performance Outcomes Form
- Appendix F: Program Budget Form
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- Appendix H: Acknowledgement of PacMtn WIOA Program Policy
- Appendix K: Budget Narrative
- Appendix J: Most Recent Financial Audit (if available)
- Appendix K: Copy of Approved Cost Allocation Plan or Written Policy/Procedures (if available)

Additional attachments may be added, labeled as appendices, at the bidder's discretion. Additional attachments will not be awarded extra points, but may be used to further illustrate the proposal's alignment with PacMtn Mission, Vision, and Values, and to evidence or validate the proposal's claims and responses.

Appendix B: Cover Sheet and Certification

Proposal Cover Page/Certification

Proposer Organization

Street Address Mailing

Address

City State Zip Code

The information contained in this proposal fairly represents the proposer's agency, organization, or business and its proposed operating plans. I acknowledge that I have read and understand the requirements of the RFP and am prepared to implement services as specified in this proposal. 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 officer of any governmental agency has any financial or other interest in this organization.

Name _____ Title _____

Address _____ City _____ State _____ Zip _____

Phone _____

E-Mail _____

Signature _____

Typed Name _____

Address _____ City _____ State _____ Zip _____

Appendix C: General and Financial Questions

This appendix should not exceed 5 pages single spaced and should reflect the formatting guidelines expressed in Section III. Address the following questions in a numbered, narrative style:

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.
6. Include the following General Vendor Information:
 - a Length of time in business
 - b Length of time in business of providing proposed services
 - c Total number of clients
 - d Total number of public sector clients
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 organization's 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.

Appendix D: Service Delivery Questions

This appendix should not exceed 15 pages single spaced and should reflect the formatting guidelines expressed in Section III. Address the following questions in a numbered, narrative style:

1. Please address your organization's mission, vision, and values, and experience providing services similar to those described in this RFP.

You might consider addressing in your response:

- *How do your organizational values align with those of PacMtn?*
- *Whether your organization has experience providing services in a Workforce Development Area with multiple counties, rural counties, areas with limited access to internet, etc.*
- *Whether your organization prioritizes universal access to workforce services, and how you have gone about improving access in similar ways to those requested in this RFP*

2. Please describe your intended outreach and partnership strategy and plan to embed meaningful services across the PacMtn region in WorkSource locations, community-based organizations and other resource-based agencies, and with regional business communities.

You might consider addressing in your response:

- *What current relationships have you already developed in the PacMtn region that will help you be successful, and might get meaningful service off the ground quickly after contract award?*
- *How will you leverage and coordinate other community services to help clients become stable and job ready?*
- *If applicable, what barriers have you encountered in the past regarding outreach and partnership in PacMtn or similar regions, and how was your strategy successful in overcoming them?*
- *Where might you develop relationships that you haven't yet, and what value would those relationships bring to the workforce system and to participants?*

3. How will your organization specifically partner with other organizations to better serve priority populations and communities of color?

You might consider addressing in your response:

- *What knowledge do your organizational staff have regarding the needs and common experiences of members of priority populations in the PacMtn region?*
- *What current relationships have you already developed in the PacMtn region that will help you be successful, and might get meaningful service off the ground quickly after contract award?*
- *If applicable, what barriers have you encountered in the past regarding outreach and partnership in PacMtn or similar regions, and how was your strategy successful in overcoming them?*
- *Where might you develop relationships that you haven't yet, and what value would those relationships bring to the workforce system and to participants?*

4. Please describe your organizational commitment to and experience providing services to priority populations as outlined in WIOA law and further outlined by the PacMtn Priority Populations Committee.

You might consider addressing in your response:

- *How are members of priority populations and communities of color represented in your own organizational staff?*
- *What training, knowledge, or experience does your organization have in providing culturally relevant and competent services?*
- *What are your organizational values and philosophy regarding diversity, equity, and inclusion?*

5. Please illustrate your Case Management Plan, describing how you will recruit participants and provide case management and individualized career services in alignment with the service expectations explained in the RFP. Please specifically indicate how your plan might vary to reach Adults, Dislocated Workers, and Youth.

You might consider addressing in your response:

- *What experience do you have providing case management and individualized career services to Adults, Dislocated Workers, and Youth? You might speak to specific career services, such as individualized employment plan development, assessment for additional needs through support services or community referral, providing individual or cohort-based industry recognized training and certification, and subsidized employment opportunities.*
 - *What training, knowledge, or expertise does your organizational staff have in delivering these services?*
 - *How would you distribute your staffing to maintain an in-person or virtual presence at WorkSource locations while also engaging with participants in the community and through partnership with other organizations?*
 - *How will you adapt services to reach priority populations?*
6. Please describe your organization’s professional development standards for training and growing your case managers and other similar/relevant roles?
- You might consider addressing in your response:*
- *What are the core elements of your staff onboarding and ongoing professional development training?*
 - *What certifications and or other industry recognized trainings are required for your staff?*
 - *What diversity and cultural competency trainings and standards are your staff held to?*
7. How will your organization collaborate with other workforce related programs?
- You might consider addressing in your response:*
- *Rapid response activities?*
 - *Business services?*
 - *Other PacMtn Demonstration Projects?*
8. How might your organization support peer-to-peer learning and empower individuals to help others that share similar life experiences?
- You might consider addressing in your response:*
- *How might you encourage participants interested in social services or similar pathways in attaining industry recognized Peer Counselor certification?*
 - *How might you collaborate with community partners for the placement of WEXes, OJTs, or unsubsidized employment for participants interested in work as a peer navigator?*
 - *How might you internally and within the workforce system utilize peer navigators to increase relevance of services for customers?*
9. Please describe your organization’s philosophy, approach, experience, and results in providing follow-up services.
- You might consider addressing in your response:*
- *What are some examples of times providing follow-up services resulted in job retention, income or career growth, etc.?*
 - *What barriers have you encountered in providing meaningful follow-up services, and how have you overcome them?*
 - *How are meaningful follow-up services related to strong relationships built beginning at outreach and further developed through intensive case management?*
10. How will your organization involve customer voice to improve service relevance and accessibility?
- You might consider addressing in your response:*
- *What strategies have you used in the past, and what made them successful or unsuccessful?*
 - *You might speak to specific areas of intended focus, such as service responsiveness and urgency, language accessibility, respectful recognition of potential staff biases, etc.*
11. Please describe your organization’s experience as a WorkSource Partner (in PacMtn or other regions) if applicable. Please indicate your understanding and willingness to participate in the following required elements of WorkSource partners, and how you intend to accomplish them:
- Regular attendance at partnership meetings as determined by the One-Stop Operator

- Participation in or facilitation of functional workgroups as assigned by the One-Stop Operator
- Successful contribution to workforce system Common Outcomes and any additionally required performance measures
- Ability and capacity to utilize PacMtn's customer tracking system
- Willingness to sign the required cost sharing Memorandum of Understanding and Infrastructure Funding Agreement

You might consider addressing in your response:

- *What is your knowledge and understanding of Common Outcomes and other required performance measures required by WIOA?*
- *What is your prior experience meeting the requirements of a WorkSource Partner?*

Appendix E: Performance Outcomes Form

Adult

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 (2022-2023)	
Enrollments Basic Services	
Enrollments: Individualized Services	
Enrollments: Training Services	
Exits to Employment Two Quarters after Exit	

Dislocated Worker

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 (2022-2023)	
Enrollments Basic Services	
Enrollments: Individualized Services	
Enrollments: Training Services	
Exits to Employment Two Quarters after Exit	

Youth

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 (2022-2023)	
Enrollments: Individualized Services	
Enrollments: Training Services	

Exits to Education or Employment Two Quarters after Exit	
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Appendix F: Budget form

Budget-Final award amount has not been established. Anticipated funding range for services is between 1,200,000 – 1,600,000 for Adult and Dislocated Worker, Youth 800,00 – 1,000,000. Please provide a combined budget for administration of funds not by county or by program. Please show supportive services by program.

Accounting Category			Total
Salaries & Wages			
Employee Benefits			
Supplies			
Communications			
Facilities			
Equipment 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 a budget narrative types of services and cost per participant. It is not necessary to budget separately Work Based Learning between WEX, OJT etc., although the narratives should include a description of the types of activities numbers of participants serviced and cost per participant.

Appendix G: Past/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.

Has the organization ever been on a contractor performance improvement plan and/or a corrective action plan? Yes _____ No _____

Appendix H: Acknowledgement of PacMtn WIOA Program Policy

This is an acknowledgement that _____ has read and been informed about the policy and procedure requirements, and expectations of the WIOA 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: _____