



TO: Interested Parties

FROM: Ken Trevino, President/CEO

DATE: April 18, 2018

SUBJECT: REQUEST FOR PROPOSALS (RFP) FOR DEVELOPMENT OF A TRAINING CURRICULUM & TRAINING SERVICES

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Workforce Solutions of the Coastal Bend (WFSCB), also known as the Coastal Bend Workforce Development Board, is soliciting proposals from professional, qualified training providers to develop a training curriculum and provide training to program staff and managers.

The description of the services solicited is provided in the attached RFP. Included in the RFP packet are the minimum requirements as it pertains to the services and information requested.

All inquiries should be directed to Robert Ramirez at (361) 885-3013 or [robert.ramirez@workforcesolutionscb.org](mailto:robert.ramirez@workforcesolutionscb.org). Mailed and hand delivered copies are acceptable. Faxed or electronic transmitted copies will not be accepted.

Workforce Solutions of the Coastal Bend is an Equal Opportunity Employer/Program. Auxiliary aid and services are available upon request to individuals with disabilities by dialing 711. They may also use (512) 936-0342; (TDD):1-800-735-2989, Voice 1-800-735-2988. Historically Underutilized Businesses (HUB's) are encouraged to apply.

# REQUEST FOR PROPOSALS (RFP)

*Issued by*



*For*

## DEVELOPMENT OF A TRAINING CURRICULUM & TRAINING SERVICES

Responses to be submitted to the

Coastal Bend Workforce Development Board (d.b.a. Workforce Solutions of the Coastal Bend)

520 North Staples, Corpus Christi, TX 78401

P.O. Box 2568, Corpus Christi, TX 78403

Issue Date: April 18, 2018

Copies of the Request for Proposals (RFP) packets are available April 18, 2018, 2:00 p.m. (CST)

Pre-Proposal Conference Date: April 24, 2018, 2:00 p.m. (CST)

Bid Responses Due Date and Time: Monday, May 14, 2018, 4:00 pm (CST)

Submission of Written Questions: April 24, 2018 – April 27, 2018, 5:00 p.m. (CST)

*Workforce Solutions is an Equal Opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Telephone access is available by dialing 711 or you can also call (512) 936-0342; (TDD): 1-800-735-2989, Voice 1-800-735-2988. Historically Underutilized Businesses (HUB's) are encouraged to apply.*

**WORKFORCE SOLUTIONS OF THE COASTAL BEND**  
**REQUEST FOR PROPOSALS (RFP)**  
**DEVELOPMENT OF A TRAINING CURRICULUM**  
**AND TRAINING SERVICES**

**PART I. GENERAL INFORMATION**

**Purpose of Request for Proposals:**

Using the Request for Proposals (RFP) method of procurement, the Coastal Bend Workforce Development Board (d.b.a. Workforce Solutions of the Coastal Bend) is soliciting proposals from professional, qualified training providers that meet the requirements of the RFP and have the capacity to develop a creative and innovative training curriculum. In addition, both e-learning and face-to-face training programs will be designed to support the skills and knowledge of the regional workforce field staff to deliver the training curriculum. The needs of Workforce Solutions of the Coastal Bend (WFSCB) are described herein, as in accordance with the terms, conditions, and specifications contained in this RFP.

WFSCB has chosen to issue this RFP to secure a contract with a training provider to develop a training curriculum for the instruction of employability skills to find and retain employment and also for the instruction of essential skills (soft skills) most in demand by employers. The intent of this RFP is to award a contract for service to the successful proposer.

After the training curriculum has been finalized and approved, WFSCB will require a one-time training for a specified number of individuals over an agreed period of time. Other potential requests for training services may be available.

The successful respondent(s), either directly or through its subcontractor(s), must be able to provide all services and meet all of the requirements requested in this solicitation and shall remain responsible for contract performance regardless of subcontractor participation in the work. The services should be delivered efficiently with innovative, attention-getting material and incorporate best practices used in the public and private sectors.

**Background:**

The Coastal Bend Workforce Development Board (Board) manages workforce development programs administered through career centers that provide workforce development services to area businesses and residents. The Board of Directors are local community members who are volunteers representing various employment and community sectors in the 11-county Coastal Bend region. The primary responsibility of the Board is to provide oversight of the delivery of workforce services, policy and program guidance, and evaluation of workforce development programs and services that effect area employers, residents and job seekers.

The 11-county area served by Workforce Solutions of the Coastal Bend includes: Aransas, Bee, Brooks, Duval, Jim Wells, Kenedy, Kleberg, Live Oak, Nueces, Refugio, and San Patricio counties.

### **Funding:**

Funding for the Board's operations and programs is provided primarily by the Texas Workforce Commission (TWC) under the Workforce Innovation and Opportunity Act (WIOA) and other federal programs. Workforce Solutions of the Coastal Bend is an equal opportunity Employer/Programs and ADA accessible. Auxiliary aids will be provided upon request. Historically Underutilized Businesses (HUBs) are encouraged to participate in all procurement programs.

### **Contract Period and Renewal Terms:**

The contract(s) will be awarded for a period of approximately four (4) months ending September 30, 2018. The contract may be renewed at the discretion of WFSCB, based on need, availability of funds, and the Contractor's satisfactory performance. In accordance with written policies and procedures of Workforce Solutions of the Coastal Bend, this contract may be renewed for one (1) additional one-year period beyond the original acceptance award.

### **Time-Frame:**

The deadline for proposal responses is Monday, May 14, 2018, at 4:00 p.m. If you have any questions in regard to this solicitation, please contact Robert R. Ramirez, Procurement and Contracts at (361) 885-3013. All proposal responses must be delivered to and received prior to this deadline. Responses received after the deadline will not be considered.

### **Question and Answer Period**

Workforce Solutions of the Coastal Bend shall accept written, e-mailed and faxed questions prior to the deadline for written questions. Questions will not be accepted after the written question deadline of April 27, 2018, 5:00:p.m. All questions asked and answered will be provided to all individuals/entities that have requested a copy of the RFP or notified Robert Ramirez via e-mail. Questions shall be addressed to:

Workforce Solutions of the Coastal Bend  
Attn: Robert R. Ramirez, Contracts and Procurement Officer  
P.O. Box 2568, Corpus Christi, TX 78403  
E-Mail: [robert.ramirez@workforcesolutionscb.org](mailto:robert.ramirez@workforcesolutionscb.org)  
Fax: (361) 356-3958

Other than specified above, all members of the Workforce Solutions Board of Directors, Board staff, authorized representatives or agents of the Board are precluded from entertaining or answering questions concerning this RFP or the procurement process. Other than the written questions submitted to the designated Board staff prior to the deadline for written questions, potential proposers are prohibited from making any contact with Board staff, its representatives, or the Board of Directors at any time during this procurement. Violations of this prohibition will result in the automatic disqualification of the offending proposer.

## **PART II. SCOPE OF SERVICES REQUESTED**

Coastal Bend Workforce Development Board, dba "Workforce Solutions of the Coastal Bend (WFSCB)", is soliciting proposals from professional, qualified trainers for the development of a creative and innovative training curriculum. The curriculum is for the instruction of employability skills to find and retain employment and also for the instruction of essential skills (soft skills). The curriculum must meet the Board's expectations for completion of a Career Ready

Workforce Certification with a strategic curriculum training package which includes customer workbooks, power point presentations and videos. A “Train-the-Trainer” training session is also required and will be conducted in Corpus Christi, Texas.

### Program Design

Workforce Solutions is soliciting innovative, attention-getting curriculum on employability and essential skills targeting all populations from entry level to experienced workers – both skilled and unskilled. The training content must address, at a minimum, the latest top five (5) topics related to employability and essential skills (soft skills) that are considered in employer demand as critical to obtaining and maintaining a job and eventually a career. The recommended topics must be supported based on empirical evidence and best practices used in both public and private sectors. Below are examples of related topics that may or may not include the most in employer demand as these topics will be determined by the proposer. Examples are:

#### Employability Skills:

- Interviews
- Resumes
- Career Exploration
- Computer technology to include on-line job applications

#### Essential Skills (Soft Skills):

- Communication Skills
- Teamwork
- Strong Work Ethics
- Leadership Management Skills

The procured curriculum will be the property of Workforce Solutions of the Coastal Bend and will be delivered in digital media that will allow WFSCB to modify the curriculum to customize for various audiences. Curriculum may be designed to include various media for presentation as long as the media is customizable by WFSCB. Proposals should include a description of training materials that will be offered such as pre and post testing options, embedded videos or other multi-media, audio instructions and guided tutorials along with downloadable hard copies. In addition, any training resources developed will be submitted to WFSCB including a flash drive and/or uploaded to I-Cloud containing all tutorials and proper documentation.

A Train-the-Trainer session will be provided to contractor management, facilitator staff, and designated Board professionals. It is expected that approximately 20 - 25 individuals will attend the training session. The Board expects that the training session will be conducted over a course of one to two weeks.

### Project Timeline and Budget

WFSCB is proposing to contract with a qualified and experienced training provider as soon as the evaluation and selection process is completed. Deliverables that may be tied to negotiated, pre-approved payments (where appropriate) are noted below.

#### Activities:

Deliverables Description	Deliverable Target	Deliverable Due Date
Provide a timeline with a start date of June 4, 2018 to outline an activity schedule for curriculum completion and budget to meet the completion date of September 30, 2018.	1 plan	Within Seven (7) working days after the contract is awarded
Approval of activity timeline and budget	Meeting	Within 5 working days after the activity timeline and budget is submitted
Progress Reports to provide current status of activity schedule and address any challenges or concerns	Written and/or in person updates on progress	Bi-weekly to monthly at a minimum based on progress demonstrated
Completion of Project to include training of staff		September 30, 2018

Though subject to change, WFSCB anticipates the following schedule:

April 18, 2018, RFP Issued  
April 24, 2018, 2:00 p.m. (CST) – Pre-Proposal Conference  
April 27, 2018, 5:00 p.m. – Deadline for Submittal of Written Questions  
April 30, 2018 - Responses to Questions Due  
May 14, 2018, 4:00 p.m. – Proposals Due  
May 15-18, 2018 – Evaluation of Proposals  
May 24, 2018 – Selection of Contractor  
May 25-29, 2018 – Contract Negotiations  
June 4, 2018 – Contract Begins

### PART III. GENERAL REQUIREMENTS AND PROVISIONS

#### Eligible Respondents:

Respondents who are able to meet the solicitation specifications regarding experience, cost, and other terms of the solicitation, and who are not debarred and/or suspended from conducting business with federal and state funded agencies may submit a response. A prospective respondent must affirmatively demonstrate their responsibility. A prospective respondent, by submitting a response, represents to the Board that it meets the following requirements:

- Have a minimum of five (5) years of demonstrated actual work experience in providing requested services;
- Is able to comply with the required or proposed solicitation;

- Have a satisfactory record of integrity and ethics; and
- Be otherwise qualified and eligible to receive an award.

#### Procurement Conditions and General Terms:

Procurement of these items shall be accordance with the state Texas Workforce Commission (TWC) procurement policies and Workforce Solutions procurement policies and general terms as follows:

- Workforce Solutions reserves the right to accept or reject any or all bids/quotes received or to cancel or extend in part or it's entirely, this solicitation, or to make partial awards.
- Workforce Solutions is exempt by law from payment of Texas Sales Tax and Federal Excise Tax.
- The intent of this solicitation is to identify the various contract alternatives and estimates of costs, if applicable, for the items solicited. Workforce Solutions is under no legal requirement to execute a contract from any response/bid/application submitted.
- Positive efforts shall be made to utilize Historical Underutilized Businesses (HUBs, i.e., minority and female-owned or operated businesses) as vendors, and to allow such organizations maximum feasible opportunity to compete for award.
- Award of purchase agreement or contract shall be made only to a responsible respondent/ bidder(s), i.e., a bidder/vendor who has demonstrated competence to deliver the specified goods/services, a proven record of business integrity and ethics, and the ability to meet the requirements of the solicitation.
- When submitting a response, it is required that the respondent have the necessary professional experience, prior training, and applicable professional judgment to perform the services and activities or deliver the goods stated in this RFP.
- Respondents/bidders shall not make offers of gratuities or favors, to any officer, employee, Board member of Workforce Solutions of the Coastal Bend, or any subcontractor employees of Workforce Solutions. Contact for technical assistance is allowed with the solicitation contact person or designated Workforce Solutions of the Coastal Bend Board staff. Violation of this instruction will result in immediate rejection of the response/bid/application.
- The contents of a successful proposal/bid/application may become contractual obligations, if a contract is awarded. Failure of the respondent/bidder to accept those obligations may result in the cancellation of the response/bid/application for selection. The contents and requirements of this solicitation may be incorporated into any legally binding and duly negotiated contract between Workforce Solutions of the Coastal Bend and the selected respondent(s)/bidder(s). Workforce Solutions of the Coastal Bend reserves the right to withdraw or reduce the amount of an award or to cancel any contract resulting from this procurement if there is misrepresentation or errors in the specifications, pricing, terms, or Respondent's/Bidder's ability to meet the terms and conditions of this solicitation or if adequate funding is not received.
- All responses/bids/applications and their accompanying attachments will become property of the Workforce Solutions of the Coastal Bend after submission and materials will not be returned. In addition, all materials that are produced as a result of this solicitation become property of Workforce Solutions of the Coastal Bend.
- Workforce Solutions of the Coastal Bend specifically reserves the right to vary the provisions set herein any time prior to the execution of the contract where such variance is deemed to be in the best interest of Workforce Solutions of the Coastal Bend.

- A response does not commit Workforce Solutions of the Coastal Bend to award a purchase agreement or contract or to pay any costs incurred in the preparation of a response/bi/application nor pay for any costs incurred prior to the execution of a formal purchase agreement or contract unless such costs are specifically authorized in writing by Workforce Solutions of the Coastal Bend.
- Workforce Solutions of the Coastal Bend reserves the right to contact any individual, agency, or employers listed in the solicitation's response, to contact others who may have experience and/or knowledge of the respondent's/bidder's/applicant's goods/supplies/services, relevant performance, qualifications, etc. and to request additional information from any and all respondents/bidders/applicants.
- No employee, officer, or member of the Board of Directors shall participate in the selection, development of a response to this solicitation, award or administration of a contract supported by the solicitation if a conflict of interest, real or apparent, would be involved.
- No purchase agreement or contract may be awarded until respondent/bidder/applicant has complied with Executive Order 12549, 29 CFR, Part 98 by submitting a signed Certification of Debarment, which states that neither the vendor, nor any of its principles, are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in a procurement by any Federal department or agency.
- In the interest of maximum free and open competition, all Workforce Solutions of the Coastal Bend members and staff will be prohibited from providing technical assistance or answering questions concerning this solicitation which may be construed as offering a competitive advantage to any respondent/bidder/applicant. Potential respondents/bidders/applicants are requested to respect these conditions by not making personal requests for assistance.
- Workforce Solutions of the Coastal Bend is an equal opportunity employer and complies fully with the nondiscrimination and equal opportunity provisions of the applicable laws. Each organization or individual that submits a response to a solicitation warrants and assures that it will comply fully with the non-discrimination and equal opportunity provisions as required by 29 CFR parts 37.20(a)(1). Each applicant for financial assistance under Title I of WIA, as defined in §37.4, must include the following assurances:  
As a condition to the award of financial assistance from the Department of Labor under Title I of WIA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

Section 188 of the Workforce Investment Act of 1998 (WIA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I—financially assisted program or activity;

Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the bases of race, color and national origin;

Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;

The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.



The grant respondent/applicant also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the grant applicant's operation of the WIA Title I-financially assisted program or activity, and to all agreements the grant applicant makes to carry out the WIA Title I-financially assisted program or activity. The grant applicant understands that the United States has the right to seek judicial enforcement of this assurance.

#### **Insurance Requirements:**

The Contractor will be required to maintain insurance coverage for the period of the contract. Contractor must obtain insurance adequate to cover Contractor's employees and against personal and bodily injury and property damage. The following minimum insurance coverage and limitations will be required;

General liability insurance for personal injury and bodily injury and property damage to a third party. The required minimum coverage shall be \$500,000 per occurrence or \$1,000,000 aggregate.

In the event you are awarded the contract, the Contractor will be required to submit proof of insurance. A statement of assurance to that effect must be included in your transmittal letter and Statement of Work response.

#### **PART IV. INFORMATION ON EVALUATION AND SELECTION CRITERIA:**

Workforce Solutions of the Coastal Bend will evaluate responses received and select the organization/firm on the basis of the following criteria:

The Board staff reviews the responses received to determine if they are responsive. For responses to be considered responsive and to be evaluated for selection, the following requirements must be met:

1. The responses must have been submitted by the due date and time.
2. The responses must be complete with the appropriate signatures.
3. The responses must be for the specific services requested and described in the RFP packet.
4. The responses must be submitted in the format described in the RFP Packet.
5. One original (marked original with original signatures) and three (3) copies must be submitted for a total of four (4) copies. Workforce Solutions will base its selection on Completeness and Responsiveness; Experience; References/Past Experience; and Price/Cost.

WFSCB reserves the right to conduct interviews with the top proposers. The interviews may be conducted on-site or by telephone.

All responses will be screened for inclusion of all required information prior to release to the evaluation team. Workforce Solutions staff may exclude from further consideration for contract award any non-responsive bid. The evaluation results may be submitted to the Board of Directors for consideration.

The Board may use Board staff, Board members, independent evaluators or a combination of all to evaluate and rank bids.

After evaluation, an award may be made on the basis of the evaluation and ranking, without discussion, clarification or modification, or the Board may enter into negotiations with the highest ranked respondent. If the Board is unable to reach agreement with the highest ranked respondent, the negotiations will terminate and negotiations will begin with the next respondent in the order of the ranking until a contract is reached or the Board has rejected all responses.

**NOTE:** After evaluation, any response with a total score of less than 70 points will be considered as non-responsive and will be disqualified from further consideration. Responses/bids/applications receiving a final score of 70 or better are not guaranteed an award.

Workforce Solutions will make a good faith effort to award contracts to Historically Underutilized Businesses (HUBs). In order to earn the points for HUB certification, a respondent must include in their bid response, a current copy of the certificate from the State.

All respondents will receive notification of proposal/bid/application approval or non-approval. A respondent/bidder/applicant who wishes to protest the decision will be required to notify the Board's Complaint Officer, in writing, within fifteen (15) days from the date of the notification letter. The complainant letter must specify the nature of the protest and desired remedies of action. Workforce Solutions reserves the right to determine whether the protest is valid and merits further consideration.

#### **Proposal Evaluation Criteria:**

The review and selection process will include the following criteria and value system:

##### **COMPLETENESS AND RESPONSIVENESS**

**VALUE 20 POINTS**

This criterion examines the completeness and responsiveness to the requirements in the RFP. Special emphasis will be given to the topics selected by the proposer.

##### **EXPERIENCE**

**VALUE 30 POINTS**

This criterion examines the current work and qualifications of the respondent which has been derived from actual work related experiences including a minimum of five (5) years of relevant prior experience providing requested services. Examples of previous work will be reviewed to determine the proposer's level of experience in providing similar services.

##### **REFERENCE/PAST EXPERIENCE**

**VALUE 20 POINTS**

The references/past experiences will be evaluated in terms of the amount of experience in working in the field of work requested. A minimum of five (5) references of active clients for the development of an employability skills training curriculum. The active clients must be current customers at the time of response submission and must be five distinct customers.

## FEES/COSTS

VALUE 30 POINTS

This criterion will determine if fees/ costs submitted are reasonable and necessary to perform the proposed services. Workforce Solutions will consider fees/cost, in terms of flexibility in costs and consistency with similar fees/costs of similar services.

## HUB

VALUE 5 POINTS

Historically Underutilized Business as certified by the State of Texas. To earn points as a HUB, bidders must be currently registered and certified with the State of Texas and provide an actual copy of your certification.

## PART V. SUBMISSION INSTRUCTIONS

### How to Submit a Response:

Responses must be submitted prior to and received by the deadline and must clearly indicate externally the Respondent's name and mailed or hand delivered to the following address:

Robert R. Ramirez, Procurement and Contracts  
Workforce Solutions of the Coastal Bend  
Street Address: 520 North Staples, Corpus Christi, TX 78401  
Mailing Address: P.O. Box 2568, Corpus Christi, TX 78403  
(361) 885-3013

### Proposal Format and Preparation:

Each respondent must submit one (1) ORIGINAL, and three (3) copies of their response (for a total of four (4)). One of the copies must be marked "ORIGINAL", and contain original signatures.

All responses must be typed and completed on 8 1/2" x 11" paper, with all pages sequentially numbered and bound. Each response must contain Attachments/Certifications A through J in the order as shown below. Any reference to details contained in bidder's attachments must state the page number of the attachment in order to be considered in evaluation of the response.

Response packages should be organized in the manner specified below:

- 1) Transmittal Letter – Include a brief introduction to your firm and your interest in this contract; give primary contact name, phone number, fax number, and e-mail address, if available. The letter must stipulate that the proposal price/cost will be valid for a period of at least one year. Also, include your statement regarding the insurance requirements.
- 2) Certification by Respondent Form (Attachment A) – complete and use this form as the cover sheet to bid response.
- 3) Bid Proposal/Your Response – Provide your response to the questions noted in Attachment B. Include this information on Attachment B.

- 4) Pricing Proposal and Itemized Costs Forms – Provide the cost/fee information noted in Attachment B-1. Include this information on Attachment B-1.
- 5) Attachments C-H – Submit the signed attachments.
- 6) Attachment I – Attached any requested documents and/or samples of work and any additional information.
- 7) References – List organizations/firms that you are currently providing this service. The active clients must be current customers at the time of response submission, have been a customer for at least one year. Submit the references as Attachment J.

**ATTACHMENTS TO BE COMPLETED AND RETURNED WITH RESPONSE:**

The attachments listed below are required. All forms must be signed, dated, and completed, as appropriate.

Attachment A - Certification By Respondent Form  
Attachment B – Bid Proposal/Your Response  
Attachment B-1 – Pricing Proposal and Itemized Cost Forms  
Attachment C - Certification Regarding Lobbying and Debarment  
Attachment D - Certification Regarding Texas Corporate Franchise Tax  
Attachment E - State Assessment Certification  
Attachment F - Workforce Solutions Disclosure of Interests  
Attachment G – Orientation of Complaint Procedures  
Attachment H – Undocumented Worker Certification  
Attachment I – Other Response Materials (Examples of work; copies of certifications/licenses, proof of insurance. Additionally, if your firm is certified as a HUB by the State of Texas, please attach a copy of the certification.)  
Attachment J – References Form

Mail or deliver in person the hard copies (original document and copies) of the bid/application to the Board's administrative offices.

for  
RFP FOR DEVELOPMENT OF A TRAINING CURRICULUM  
& TRAINING SERVICES

Name of Individual Responding: \_\_\_\_\_

Name of Firm (if applicable): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email address: \_\_\_\_\_

How many years has your firm been providing similar services. \_\_\_\_\_

Is your firm registered with the state General Services Commission as a HUB. \_\_\_\_\_

Include your Employer vendor state license number for providing services: \_\_\_\_\_

If response is YES, include the HUB certification as part of Attachment I.

Include your Texas ID Number (issued by the Texas Comptroller of Public Accounts): \_\_\_\_\_

Include your Federal Employer ID Number (issued by the Internal Revenue Service): \_\_\_\_\_

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III. SIGNATURE

Respondent certifies that each attachment to this Statement of Certification has been completed and is submitted as integral to this Statement.

I certify that I am authorized to submit this Statement on behalf of the above named organization. If any information changes significantly, the Workforce Solutions of the Coastal Bend will be notified. I certify that the contents of this document are true and correct.

Signature of Respondent:\_\_\_\_\_

Date Form Submitted:\_\_\_\_\_

Note: The deadline for the receipt of bid proposals is Monday, May 14, 2018, 4:00 p.m. (CST).

Responses received after the deadline will not be considered.

Responses should be mailed or delivered to:

Workforce Solutions of the Coastal Bend

Attention: Robert R. Ramirez, Contracts and Procurement Officer

520 North Staples Street, Corpus Christi, TX, 78401 (if hand-delivered), or

P.O. Box 2568, Corpus Christi, TX 78403 (if mailed)

## ATTACHMENT B

### (Submit Your Bid Response / Details)

Please note that any reference to details on Respondent's attachments must state the page number of attachment in order to be considered in the evaluation of the bid response.

Please respond to the following questions pertaining to the RFP specifications and required pricing/cost information.

- I. Provide a brief history of your company.
- II. Provide a brief summary of your firm's demonstrated capability, including length of time that your firm has provided these services, and who are some of your major customers.
- III. Provide an outline with detail information on **"How"** your firm will incorporate and accomplish the stated scope of services requested, as noted on pages 4 and 5 of the RFP. The response should address the section on "Program Design" and provide detailed information on the training content including the latest topics recommended. Additionally, include a description of **"How"** these topics were selected, e.g., research, testing, etc. The response should also include any specific information on planned meetings. The meetings may consist of: a kick-off meeting to establish communication with the WFSCB Management Team and to gain an understanding of the project's objective(s) and the initial procedures and formats that will be used through the planning and implementation of the development of the training curriculum and delivery of the training services. Finally, your response should address other periodic meetings, interim and final reports, including special status reports, as requested.
- IV. Provide the names and titles of the key personnel that will be directly managing the project, involved in the development of the curriculum, facilitating meetings, and delivery of training services. Please include current resumes or bios for the personnel included in this project.
- V. Will your firm be subcontracting any of the work stated in the RFP? If your response is Yes, please state the firm's name, purpose for subcontracting, and services you will be subcontracting.
- VI. Would any price discounts be offered by your firm? If discounts are offered, please provide information on the discount amounts and conditions. If a discount is applied, the terms of the discount should be clearly explained. The discounts, if any, should also be included in your pricing proposal budget.
- VII. If awarded the contract, the expectations are the Contractor will receive incremental payments for interim deliverables and the final product(s). Will this payment process be acceptable? If no, please explain.
- VIII. Please provide any other information you may feel is important in order to determine why your company is the best choice, over your competitors, for this project.

**Attachment B-1**  
**Pricing Proposal and Itemized Costs**

Please submit an itemized budget outlining the different phases of the project by tasks, description, estimated timelines, and cost. The budget should also include a total cost for the project during the first year of contract. At a minimum, itemize for the services bulleted below.

Please be aware that WFSCB reserves the right to negotiate any terms and conditions of the award of contract for these services including costs.

- Staff time for meetings and progress reports
- Development of curriculum
- Initial Training (All Staff)
- Train the Trainer
- Materials and supplies
- Total Project Cost



## ATTACHMENT C

### CERTIFICATONS REGARDING LOBBYING, DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS, AND DRUG-FREE WORKPLACE REQUIREMENTS

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Lobbying: This certification is required by the Federal Regulations, implementing Section 1352 of the Program Fraud and Civil Remedies Act, Title 31 U.S. Code, for the Department of Education (34 CFR Part 82), Department of Health and Human Services (45 CFR Part 93).

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The undersigned contractor certifies that:

- (1) No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan or cooperative agreement.
- (2) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

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Debarment, Suspension, and Other Responsibility Matters: This certification is required by the Federal Regulations, implementing, Executive Order 12549, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

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The undersigned contractor certifies that neither it nor its principals:

- (1) Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
- (2) Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, State or Local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (3) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in Paragraph (2) of this certification; and,
- (4) Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification.

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Drug-Free Workplace: This certification is required by the Federal Regulations, implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701; for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), and Department of Health and Human Services (45 CFR Part 76).

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The undersigned contractor certifies that it shall provide a drug-free workplace by:

- (a) Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;
- (b) Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the Contractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug abuse violations in the workplace;

- (c) Providing each employee with a copy of the Contractor's policy statement;
- (d) Notifying the employees in the Contractor's policy statement that as a condition of employment under this contract, employees shall abide by the terms of the policy statement and notifying the Contractor in writing within five days after any conviction for a violation by the employee of a criminal drug statute in the workplace;
- (e) Notifying the Commission within ten days of Contractor's receipt of a notice of a conviction of an employee; and,
- (f) Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or require such employee to participate in a drug abuse assistance or rehabilitation program.

These certifications are a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction.

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Name and Title of Authorized Representative

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Signature

ATTACHMENT D

TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

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Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporation that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this contract is current in its franchise taxes must be signed by the individual on Form 203, Corporate Board of Directors Resolution, to sign the contract for the corporation.

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The undersigned authorized representative of the corporation contracting herein certifies that the following indicated statement is true and correct and that the undersigned understands making a false statement is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

\_\_\_\_\_ The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

\_\_\_\_\_ The corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

\_\_\_\_\_  
Name and Title of Authorized Representative

\_\_\_\_\_  
Signature

ATTACHMENT E

STATE ASSESSMENT CERTIFICATION

The undersigned authorized representative of the corporation contracting herein certifies that the following indicated statement is true and correct and that the undersigned understands making a false statement is a material breach of contract and is grounds for contract cancellation.

The corporation certifies that:

\_\_\_\_\_ It is current in Unemployment Insurance taxes, Payday and Child Labor law monetary obligations, and Proprietary School fees and assessments payable to the State of Texas.

\_\_\_\_\_ It has no outstanding Unemployment Insurance overpayment balance payable to the State of Texas.

\_\_\_\_\_  
Name and Title of Authorized Representative

\_\_\_\_\_  
Signature

ATTACHMENT F

Coastal Bend Workforce Development Board

DISCLOSURE OF INTEREST

It is the fiscal policy that all persons or firms seeking to do business with Workforce Solutions provide the following information. Every question must be answered. If the question is not applicable, answer with "NA".

FIRM NAME: \_\_\_\_\_

P.O.BOX: \_\_\_\_\_

STREET: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

FIRM IS:

1. Corporation ☐ 2. Partnership ☐ 3. Sole Owner ☐ 4. Association ☐ 5. Other ☐ \_\_\_\_\_

DISCLOSURE QUESTIONS

If additional space is necessary, please use the reverse side of this page or attach separate sheet.

1. State the name of each "non-managerial employee" of Workforce Solutions having an "ownership interest" constituting 5% or more or the ownership in the above named "firm" or who is an officer, director, employee, or consultant employed or associated with your organization:

Name

Job Title and Section (if known)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. State the names of each "managerial employee" of Workforce Solutions having an "ownership interest" constituting 5% or more of the ownership in the above named "firm" or who is an officer, director, employee, or consultant employed or associated with your organization:

Name	Title
_____	_____
_____	_____

3. State the names of each "board member" of Workforce Solutions having an "ownership interest" constituting 5% or more of the ownership in the above named "firm" or who is an officer, director, employee, or consultant employed or associated with your organization:

Name	Board, Commission, or Committee
_____	_____
_____	_____

4. State the names of each employee or officer of a "consultant" of Workforce Solutions who worked on any matter related to the subject of this contract and has an "ownership interest" constituting 5% or more of the ownership in the above named "firm" or is an officer, director, employee, or consultant employed or associated with your organization:

Name	Consultant
_____	_____
_____	_____

## CERTIFICATE

I certify that all information provided is true and correct as of the date of this statement, that I have not knowingly withheld disclosure of any information request; and that supplemental statement will be promptly submitted to Workforce Solutions, as changes occur.

Certifying Person: \_\_\_\_\_

Title: \_\_\_\_\_

Signature of Certifying Person: \_\_\_\_\_

Date: \_\_\_\_\_

## **ATTACHMENT G**

### **Coastal Bend Workforce Development Board**

#### **ORIENTATION TO COMPLAINT PROCEDURES FOR SERVICE PROVIDERS**

The policy of the Coastal Bend Workforce Development Board (the Board) is to resolve complaints in a fair and prompt manner. The Board's administrative directive on GRIEVANCE PROCEDURE establishes the guidelines for the resolution of grievances/complaints and requires this orientation sheet be received and acknowledged by all individuals or organizations providing services to the Board under contract or agreement.

Acts of restraint, interference, coercion, discrimination or reprisal towards complainants exercising their rights to a file a grievance under Board policy are prohibited. A complainant is the individual or organization filing a grievance/complaint. A respondent is the individual or organization against whom a grievance/complaint is filed. Inquiries regarding the resolution of grievances should be addressed to:

#### **Coastal Bend Workforce Development Board**

**ATTN: EO Officer**

**520 North Staples Street**

**P.O. Box 2568**

**Corpus Christi, Texas 78403**

**Telephone: (361) 885-3019**

Every effort should be made to resolve your grievance at the optimum management level. The Board's EO Officer is available to assist, as necessary, in the grievance resolution process.

The time limit to file a complaint under the Board's grievance procedure is 30 calendar days from the date of the event that leads to the filing of the grievance. A copy of the Board's Policy and Procedure is available upon request.

#### **EQUAL OPPORTUNITY IS THE LAW**

The Board is prohibited from discriminating on the ground of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and for beneficiaries only. If you think that you have been subjected to discrimination, you may file a complaint within 180 days from the date of the alleged violation with the Equal Opportunity Officer at the:

#### **TEXAS WORKFORCE COMMISSION WORKFORCE DEVELOPMENT DIVISION EQUAL OPPORTUNITY OFFICE**

**101 E. 15<sup>th</sup> STREET**

**AUSTIN, TEXAS 78778**

**Telephones: (512) 936-0343; (TDD): 1-800-RELAY TX, Voice 1-800-RELAY VV.**

or you may file a complaint directly with the:

#### **DIRECTOR, DIRECTORATE OF CIVIL RIGHTS (DCR) U.S. DEPARTMENT OF LABOR 200 CONSTITUTION AVENUE NW, ROOM N4123 WASHINGTON, D.C. 20210**

If you elect to file your complaint with the Texas Workforce Commission (TWC), you must wait until the TWC issues a decision or until 60 days have passed, whichever is sooner, before filing with DCR (see address above). If the TWC has not provided you with a written decision within 60 days of the filing of the complaint, you need not wait for a decision to be issued, but may file a



complaint with DCR within 30 days of the expiration of the 60 day period. If you are dissatisfied with the TWC's resolution of your complaint, you may file a complaint must be filed within 30 days of the date you received notice of the TWC's proposed resolution.

By my signature below, I acknowledge this orientation to the Board's complaint procedures for services providers and the statement regarding EQUAL OPPORTUNITY IS THE LAW:

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Signature of Certifying Person

---

Date

## ATTACHMENT H

### Coastal Bend Workforce Development Board

#### UNDOCUMENTED WORKER CERTIFICATION

Effective September 1, 2007, HB 1196 amended Subtitle F, Title 10, of the Texas Government Code to add Subsection 2264. Chapter 2264 directs public agencies, state or local taxing jurisdictions, and economic development corporations (public entities) to require that any business submitting an application to receive public subsidies include in the application a statement certifying that the business, or branch, division or department of the business does not and will not knowingly employ an undocumented worker.

In the event that a business grantee is found in violation of 8U.S.C. subsection 1324a(f), consistent with the requirements of Texas Government Code subsection 2264, Boards are permitted to bring a civil action to recover any amounts owed, as well as court costs and reasonable attorney's fees.

Penalties incurred by business grantees shall be assessed damages at a rate of 20% of contract award. Said damages shall be made payable to the Board within 120 days of receiving the notice of violation.

#### DEFINITION OF TERMS

**Public Subsidy** – is broadly defined Texas Government Code §2264.001 (3) as a public program or public benefit or assistance of any type that is designed to stimulate the economic development of a corporation, industry, or sector of the state's economy or to create or retain jobs in Texas. The term includes, among other things, bonds, grants, loans, loan guarantees, benefits relating to an enterprise or empowerment zone, infrastructure development and improvements designed to principally benefit a single business or defined group of businesses, and matching funds. The Commission's Office of General Counsel has found that HB 1196 does not apply to the acquisition of goods and services.

**Undocumented Worker** – is defined as an individual who, at the time of employment, is not lawfully admitted for permanent residence in the United States, or is not authorized under law to be employed in that manner in the United States.

#### CERTIFICATION

Contractor certifies that no undocumented workers will be employed during the execution of this contract. By the signature indicated below, the contractor verifies their understanding of the terms and conditions of this requirement.

---

Signature of Certifying Person

---

Date

ATTACHMENT I  
OTHER RESPONSE MATERIALS

ATTACHMENT J

REFERENCES FORM

**REFERENCES/PAST EXPERIENCE – Maximum Points: 20**

Failure to provide and include the following information with your response by the submission date of the bid may result in disqualification from further consideration for an award resulting from this solicitation. Each reference will be contacted for evaluation purposes. Any reference that does not respond in the allotted time provided by the Board will result in a score of zero.

REFERENCE #1:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (To/From) Dates	

REFERENCE #2:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (To/From) Dates	

REFERENCE #3:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (To/From) Dates	

REFERENCE #4:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (To/From) Dates	

REFERENCE #5:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (To/From) Dates	