

# REQUEST FOR PROPOSAL

*Issued by*



*For*

## MANAGEMENT AND OPERATION OF CAREER CENTER SYSTEM (Including Youth Services)

RFP No. 23-05

Proposals to be submitted to the Coastal Bend Workforce Development Board (d.b.a. Workforce Solutions)

**Issue Date: April 3, 2023, 2:00 pm Central Time**

**Copies of the RFP are available April 3, 2023, 2:00 pm Central Time**

**Pre-Proposal Conference: April 10, 2023, 10:00 am Central Time**

**Applications Due: May 22, 2023, 4pm Central Time**

**Proposal Due: June 26, 2023, 4:00 pm Central Time**

Procurement is open and subject to the availability of funds.

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This document contains vital information about requirements, rights, determinations, and/or responsibilities for accessing workforce system services. Language services, including the interpretation/translation of this document, are available free of charge upon request.

Este documento contiene información importante sobre los requisitos, los derechos, las determinaciones y las responsabilidades del acceso a los servicios del sistema de la fuerza laboral. Hay disponibles servicios de idioma, incluida la interpretación y la traducción de documentos, sin ningún costo y a solicitud.

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Management and Operation of Career Center System  
(Including Youth Services)  
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## **Introduction**

Workforce Solutions Coastal Bend (WFSCB) appreciates your interest in providing services to the Coastal Bend Region. This Request for Proposal (RFP) incorporates the information necessary for eligible offerors to submit a responsive proposal. Throughout this document you will note [blue, underlined](#) text which represents links to supporting documentation and/or referenced information that will increase the potential for a successful proposal. To facilitate the development of proposals, potential offerors will have the opportunity to attend a pre-proposal conference to ask questions regarding the RFP and its process. Additional questions can be asked during the predetermined question and answer period addressed in the procurement schedule.

## **Background**

The Coastal Bend Workforce Development Board d.b.a. Workforce Solutions Coastal Bend (WFSCB) is a non-profit, tax-exempt organization that oversees workforce development programs in the eleven (11) county Coastal Bend Workforce Development Area (WDA). These programs serve employers and job seekers in an effort to match job seeker skills with employer's hiring needs. WFSCB's total operating budget is approximately \$46,000,000. WFSCB is comprised of up to thirty-three (33) Board members, the majority of which represent private sector businesses in the region. The balance of the membership of Workforce Solutions is composed of representatives of educational agencies, literacy organizations, organized labor, rehabilitation services, community-based organizations, economic development agencies, the state human service agencies, and the public employment service. WFSCB is responsible for the planning, evaluation, and oversight of workforce development programs in the region. WFSCB primarily receives funding from the United States Department of Labor (DOL) through the Texas Workforce Commission (TWC).

## **Mission**

At WFSCB we invest in our regional economic success through access to jobs, training, and employer services. To accomplish this mission WFSCB has adopted the following strategies:

- Collaborate with industry, education, economic development and labor to develop a comprehensive regional workforce strategic plan;
- Develop a trainable and available workforce;
- Provide workforce-relevant educational and training opportunities for youth.

WFSCB has determined that the best way to serve job seekers is to provide employer-driven workforce development services. These services focus on employers' need for a knowledgeable, skillful workforce to help business become productive and competitive both locally and in the global market. Job seekers benefit from this perspective as more employment opportunities become available to job seekers through business success and growth resulting in increased employer participation in the workforce system and increase

employment opportunities for job seekers. The career center system contractor will be charged with assisting WFSCB in its implementation of an employer driven career center system.

**An Employer Driven System** - The DOL and the TWC have charged the Texas Workforce Boards to become more responsive to the needs of employers, to become an “employer-driven” workforce development system. A supply-driven system focuses on providing job seekers and employed workers with employment skills. An employer-driven system focuses on meeting employers’ needs for specific types of skilled workers. In an employer-driven system, the needs of the job seekers and workers are addressed in the context of employer needs (i.e., by ensuring that job seekers are prepared for and connected to available employment opportunities).

## **Value Statements**

### Accountability

We address our customers and co-workers in a positive manner that elevates their spirit and creates a professional, supportive workplace for staff, job seekers, and employers.

### Teamwork

We combine our individual talents for the benefit of the mission and common goals leveraging our unique abilities and contributions.

### Trust

We consistently deliver on our commitments to our customers and co-workers to establish strong, sustainable relationships.

### Integrity

We are honest, supportive, candid in addressing difficult issues, and willing to share success to demonstrate respect and consideration for our customers and co-workers.

### Tenacity

We resist giving up when the going gets tough and support our customers and co-workers in seeing that issues are resolved, and the job gets done.

### Understanding

We are serious and passionate about delivering our services with compassion and empathy.

### Dignity

We interact with customers and co-workers professionally regardless of their backgrounds, experience, and circumstances to reflect our commitment as public servants.

### Enthusiasm

We recognize the importance and value of our work and know that every day we have the opportunity to help build the economic success of our regional economy.

## **Board Goals**

### *Goal 1 – Establish and strengthen partnerships*

#### Strategies:

- Assess & Leverage Relationships and Identify Gaps in Services
- Cultivate One-on-One Relationships with Strategic Partners and Businesses
- Provide Seamless Information Pipeline Between Career Center Service Professionals
- Track of Key Community Relationships
- Expand Organizational Relationships to Support Special Initiatives

### *Goal 2 – Effectively/Efficiently Target Rural Area Services*

#### Strategies:

- Ensure Service Delivery meets Rural needs/demands
- Actively Promote Services
- Increase Visibility of Workforce Team in Rural Areas
- Link Board Professionals with Career Center Service Professionals in Rural Area

### *Goal 3 – Increased Workforce Awareness*

#### Strategies:

- Gain Visibility for Workforce Activities
- Educate Key Workforce Audiences using Outreach Tools and Collaterals
- Leverage Resources to Maximize Value

### *Goal 4 – Expand Innovative Services to Business*

#### Strategies:

- Provide High-Quality, Skills Appropriate Training to meet Employer Needs
- Identify Job Seekers Requiring Additional Services and Support to Obtain Employment

### *Goal 5 – Explore New Revenue Opportunities*

#### Strategies:

- Diversify New Income Sources
- Leverage Existing Funding

### *Goal 6 – Improve Internal Operational Efficiencies*

#### Strategies:

- Minimize Organizational Bureaucracy
- Demonstrate Professional Quality System-Wide
- Ensure Efficient and Effective Use of Resources
- Strengthen Relationship with Appointed Board
- Provide Employees with Secure, Consistent Access to information
- Streamline Communications with Customers

### *Goal 7 –Refine Board Culture*

#### Strategies:

- Increase Awareness of Professional Resources
- Engage Appointed Board of Directors
- Demonstrate Professionalism

## Scope of this Request

WFSCB is seeking proposals for the management and operation of the Coastal Bend Career Center System to serve employers and eligible adults, adult dislocated workers and youth, effective October 1, 2023. **WFSCB is seeking an experienced contractor with a proven record of success in providing workforce development services, providing effective on-site leadership, training, and oversight to staff, managing complex budgets, and obtaining successful outcomes for employers and job seekers alike.** This RFP provides the necessary information and instructions to submit a responsive proposal for these requested services.

The Coastal Bend Career Center System operates using the “Texas Model” wherein all programs and services are provided through a “one-stop” location where employers and job seekers access these services.

The **career center system contractor** will be required to:

- Understand and commit to the mission and vision of WFSCB.
- Implement WFSCB’s strategies and attain WFSCB’s objectives as presented in the Business & Strategic Plan.
- Expand community awareness of workforce services to job seekers, business, and community and faith-based organizations.
- Expand outreach efforts to special populations to include persons with disabilities, veterans, foster youth, older workers, long term unemployed and dislocated workers.
- Establish working partnerships with other Board contractors and entities.
- Recruit, hire, and train an adequate number of qualified team members to operate the career centers, provide exemplary service to customers, and foster a commitment to excellence.
- Provide effective opportunities for staff development and training, and benefits and incentives to attract the best candidates for positions.
- Identify subject-matter experts to provide program guidance to career center team members and communicate with board team members.
- Develop and implement funding strategies that maximize the delivery of services throughout the entire Coastal Bend WDA.
- Implement and manage regular funds and special-funded programs and provide related performance and expenditure reports.
- Manage daily assignments of TWC Employment Services team members according to TWC State Model.
- Triage and coordinate services with co-located Texas Veterans Commission staff.
- Provide priority of service for Veteran customers across all programs.
- Ensure accessibility of service across programs for persons with disabilities.
- Coordinate with all career center partners for the smooth delivery of services; including co-case managing
- Greet, gather information, and triage all job seekers upon entry into the career center.
- Be responsible for driving and the delivery of services on the WFSCB’s Mobile Career Center.
- Maintain the confidentiality of customer information.
- Exceed all performance measures as set forth by WFSCB.
- Provide excellent customer service, utilize tools to assess customer satisfaction and report customer satisfaction data to WFSCB.
- Maintain data integrity by complete, accurate and timely data entry into TWIST as required by TWC and WFSCB.
- Maintain an Individual Training Account (ITA) and participant cost system to reflect accurate client service transactions and balances. WFSCB will issue payment for training costs and support

services, except for work experience; however, the contractor is responsible for managing the funds and utilize the MIP requisition/encumbrance system to track all participant costs. Participant training and support services costs will be provided to WFSCB by funding stream and TWIST ID so that information can be accessed.

- Provide a fiscal system that effectively tracks all use of funds and readily provides relevant fiscal information to WFSCB, whenever requested. WFSCB will request that the contractor allow read only rights to the contractor financial system to access information or provide a CSV file for data analysis of monthly expenditures WFSCB will require a monthly labor distribution report of all wages paid by the contractor to reconcile the bill in aggregate by cost category as described in [WD Letter 04-15, Change 2: Cash Draw and Expenditure Reporting System Instructions—Update \(texas.gov\)](#).
- Assist WFSCB to maintain an inventory of all property and equipment used by the career centers and implement WFSCB's facilities management procedures.
- Implement a safety program for all employees to ensure safe career center operations.
- Coordinate all intra-office and inter-office relocations with WFSCB. All relocations must be pre-approved by WFSCB.
- Always maintain designated lead staff during the career center scheduled hours of operation.
- Compliance with the requirements of the State of Texas Senate Bill 642 and House Bill 1863.
- Compliance with DOL rules and regulations, TWC rules and regulations, TWC WD Letters and Technical Assistance Guides and Manuals, and board policies for programs and fiscal management and IT (Information Technology).
- Compliance with all requirements of all program laws, regulations, rules and directives for the Workforce Innovation & Opportunity Act, TANF/Choices, Trade Act, Wagner-Peyser Employment Services, and Supplemental Nutrition Assistance Program Employment & Training (SNAP E&T), NCP (Non-Custodial Parent)-Choices, and Special Initiatives).
- Exercise diligence in managing programs and carrying out appropriate self-evaluation monitoring activities that comply with the TWC Financial Management Manual for Grants and Contracts, Board policies/procedures/directives, and Board risk management; and taking prompt corrective action against known violations of the legislation, regulations, policies, contract provisions, and other requirements imposed by WFSCB or by TWC.
- Know where the jobs are and connect skilled job seekers to opportunities in the region.
- Understand the skills and competencies inherent in high-growth, high-demand jobs.
- Engage employers within high-growth, high-demand industry sectors.
- Work to meet the needs of small employers.
- Understand the challenges faced by employers in hiring qualified skilled individuals and develop solutions to address through partnerships between industry leaders and educational institutions.
- Implement innovative workforce solutions focused on the "right skills" by translating businesses' needs into training programs and career guidance.
- Assist WFSCB in its investment of training dollars; maximize the leveraging of resources and in allocating training resources to provide the skills and competencies necessary to support industry now and in the future.
- Work collaboratively with education partners to meet employer skills needs, develop innovative initiatives and programs that are recognized at the local, state, and national levels.
- Develop and implement strategies that meet employer demand based on available resources.
- Measure the impact of Workforce Solutions through employer feedback and continually adjust strategies for improvement.
- Work collaboratively with community partners to serve mutual customers.

**Business Services to Employers** include:

- Recruitment, screening, and referral of qualified, motivated job applicants
- Apprenticeship creation and expansion
- Customized and on-the-job training
- Subsidized employment
- Participation in and development of customized job fairs
- Assessment of basic skills and work aptitudes of potential employees
- Complete interviewing facilities with fax, phone, and computer access
- Unlimited job posting and maintaining job orders through WorkInTexas.com
- Job matching services
- Current labor market trends and other labor market information including average wages, industry and occupation growth, turnover rates, and more
- Employment and labor law information
- Unemployment Insurance claims information
- Information and assistance in accessing tax incentive programs
- Assistance in arranging training for incumbent workers
- Referral to education and training providers
- Consult on topics such as, Equal Opportunity Employer/Program, The American with Disabilities Act, hiring/firing, turnover analysis, salary and benefits, unemployment insurance, job skills analysis, and staff development
- Professional outplacement services for companies that are restructuring, downsizing or closing operations

**Services to Job Seekers** include:

- Staff initiated referrals on WorkInTexas.com job matches
- Resource room for work registration
- Information on the area labor market and available jobs
- Career information for career exploration and counseling
- Assessment of education, skills, aptitude
- Outreach for adults, youth, and dislocated workers
- Intake processing to determine eligibility for programs
- Job placement assistance for UI (Unemployment Insurance) claimants and specialized program participants
- Access to occupational skills training
- Staff assessment services for job search, identifying training options and financial aid
- Program services for in-school and out-of-school youth ages 16 through 24 to include improved education and skills competencies and effective connections to employers: comprehensive guidance and counseling, tutoring, mentoring, entrepreneurial skills, local labor market information, access to alternative schools, opportunities for training including work experience, financial literacy, preparation for post-secondary education, activities related to leadership development, decision making, citizenship, and community services and follow-up services after program completion.
- Virtual service as needed or requested.



## Local Initiatives

Below is a list of current initiatives important to WFSCB and the Coastal Bend community. We continually seek new, innovative ways to provide services to the region's employers and job seekers. New opportunities can arise at any time.

Adult Education and Literacy (AEL) - WFSCB is dedicated to increasing the post-secondary education of our Coastal Bend workforce. This effort begins with connecting job seekers with opportunities to attain ESL (English as a Second Language) & GED credentials. WFSCB works with local AEL providers and local literacy councils to connect customers with the services they need.

Vocational Rehabilitative Services (VRS) Transition – WFSCB will continue to work with the management and counselors of VRS to ensure services are integrated into all programs and services to individuals with disabilities. As part of Texas Workforce Solutions, WFSCB and VRS will continue to collaborate on effective ways to integrate our services, including shared Career Center space.

Coastal Compass Education & Career Resource Center- Located at the La Palmera Mall, the Coastal Compass provides education and employment information to customers seeking to increase their educational attainment. Partners include area training providers who have programs from GED to PhD. WFSCB is a partner and referral source.

Youth Opportunities Unlimited (YOU)- works with local independent school districts, juvenile justice courts, foster youth service providers, and other community organizations serving youth to provide local labor market intelligence, career information, and Coastal Compass promotional materials to the youth they serve. WFSCB rebranded its youth program as YOU to provide seamless, multi-program services to the youth of the Coastal Bend. Local labor market intelligence is provided to ISD's, employers, jobseekers and youth via onsite presentations and online access to Career Coach, a labor market information tool accessible through the WFSCB website. The WIOA Youth program is one of the programs under the YOU umbrella. Coastal Compass customers are assessed for WIOA services as barriers to education and employment are found. If eligible, the customers then receive the benefit of year-round WIOA Youth services.

YOU! Learn Educator Externships- WFSCB submits annually a proposal to TWC to create educator externship opportunities for local teachers and counselors.

YOU! Earn and Learn- WFSCB in partnership with Vocational Rehabilitation Services program, launched this summer program to help create career pathways to employ students with disabilities.

National Dislocated Worker Grants- Due to economic conditions in the region, WFSCB participates in National Dislocated Worker grants that provide training and employment services to the long-term unemployed.

Rural Career Center/Coastal Bend College Co-location- WFSCB Career Centers in Beeville, Alice, and Kingsville are located on Coastal Bend College campuses to provide services to students and

recent graduates seeking employment and familiarize existing workforce customers with the college campus to encourage post-secondary education opportunities. Brooks County ISD has provided space in Falfurrias for a WFSCB Career Center satellite office. Via a partnership with Goodwill Industries of South Texas, a satellite office exists in the Job Connections Center in Rockport, Texas.

Ticket to Work Program - WFSCB is an authorized Employer Network (EN) for the Ticket-to-Work program. The program provides employment services to people receiving Social Security benefits. Under this program most beneficiaries become eligible for the Ticket-to-Work Program when they start to receive SSDI or SSI benefits based on disability.

### **Board Communications/Outreach Plan**

The goal of WFSCB's Communication/Outreach plan is to:

Develop a new vivid interesting and creative communications umbrella to captivate and persuade targeted constituencies. Establish impactful brand name recognition, unified message framework, and focus on Workforce Solutions' mission and services.

The objective is to create brand recognition for Workforce Solutions services and to identify who we are, what we do, and why we do it.

WFSCB has developed Strategic Marketing Standards and Guidelines which establish specific requirements for all marketing, communications, public relations, and outreach activities. WFSCB requires each of its service providers to adhere to the Strategic Marketing Standards and Guidelines so that all forms of media including print, broadcast, digital replications, video, web and other outreach and operational materials used to communicate with customers and potential customers contain a uniform look and message. A copy of the **Strategic Marketing Standards and Guidelines** is available on WFSCB web site: [www.workforcesolutionscb.org](http://www.workforcesolutionscb.org).

### **Workforce Development Area Information**

The Coastal Bend WDA includes the following eleven counties:

- Nueces
- San Patricio
- Aransas
- Bee
- Live Oak
- Refugio
- Brooks
- Duval
- Jim Wells
- Kenedy
- Kleberg

## Career Centers

There are six full-service Workforce Solution Career Centers:

- Beeville (Bee County) Coastal Bend College Campus, 3800 Charco Rd.
- Alice (Jim Wells County) Coastal Bend College Campus, 704 Coyote Trail
- Kingsville (Kleberg County) Coastal Bend College Campus, 1814 South Brahma Blvd
- Corpus Christi (Nueces County) 520 North Staples and 4981 Ayers St. Ste. 400
- Sinton (San Patricio County) 1113 East Sinton

There are two limited-service sites:

- Falfurrias (Brooks County) 221 S. Calixto Mora Avenue
- Rockport (Aransas County) GoodWill Jobs Connection Center 1326 Highway 35 North.

The Beeville Career Center serves Bee, Live Oak, and Refugio counties. The Alice Career Center serves Jim Wells and Duval counties. The Kingsville Career Center serves Kleberg, Brooks and Kenedy counties. The Sinton Career Center serves San Patricio, and the Rockport Satellite Office serves Aransas County. Corpus Christi/Nueces County is served by two centers: Staples and Mission Career Center.

WFSCB provides for the infrastructural needs of the career centers and security services. This includes desks, file cabinets, chairs, tables, partitions, computer equipment, fax machines, copiers, and all communication devices. Additionally, WFSCB holds all the leases for the centers where services are provided.

## Customer Information

	<u>BCY 22</u>	<u>BCY 21</u>	<u>BCY 20</u>				
	Current Performance	One Year Earlier	Two Years Earlier	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
Customers Served	13,228	17,052	15,058	5,556	5,274	4,959	2,593
Total Employers Served	3,496	3,194	2,758	1,984	1,738	1,736	1,811
Total Job Seekers Served	9,732	13,858	12,298	3,572	3,536	3,223	2,658
At Risk Served	4,859	5,433	5,530	1,769	1,801	1,686	1,426
Staff-Assisted Served	9,618	13,595	12,141	3,532	3,487	3,171	2,630
Beyond Core Served	2,966	3,943	2,602	885	932	1,055	1,051
Staff Guided Served	2,418	3,246	2,217	602	649	675	589
Customers Trained	304	398	317	162	158	181	142
Claimants Served	5,035	10,163	7,573	1,933	1,912	1,566	1,122
ReEmployment Services Claimants Serve	4,490	10,130	7,564	1,676	1,626	1,357	930
RRES-Served Claimants Served	1,371	1,938	812	596	498	323	299
WIOA Youth Served	177	222	204	86	107	113	98
WIOA Out-of-School Youth Served	118	131	135	29	63	72	65
WIOA Adult/DW Served	328	352	389	175	178	191	171
ES Veterans Served	796	991	982	329	279	251	232
ES Disabled Veterans Served	251	35	200	84	93	75	83
TAA Served	1	2	6	1	0	0	0
TANF Choices Served	211	89	267	91	84	92	88
SNAP E&T Served	587	322	602	101	110	242	228
Ex-Offenders Served	276	348	443	102	90	93	67

## Traffic Counts by Center

Coastal Bend BCY 2022												
	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22
Alice	257	244	156	162	160	124	118	186	317	259	432	144
Beeville	337	250	151	75	53	96	79	94	390	273	350	71
Kingsville	256	186	182	213	150	23	293	428	388	272	307	124
Falfurrias <sup>1</sup>	-	-	-	-	-	-	-	-	-	-	-	-
Sinton	188	185	130	132	174	148	187	216	292	233	336	156
Staples CC	1,574	1,302	1,460	1,407	1,681	1,823	1,835	2,155	1,794	1,432	2,001	1,031
Rockport <sup>2</sup>	-	-	-	-	-	-	-	27	42	60	62	44
<b>Total WDA</b>	<b>2,612</b>	<b>2,167</b>	<b>2,079</b>	<b>1,989</b>	<b>2,218</b>	<b>2,421</b>	<b>2,512</b>	<b>3,106</b>	<b>3,223</b>	<b>2,559</b>	<b>3,488</b>	<b>1,570</b>

## Current Staffing

	COASTAL BEND CONTRACTOR POSITIONS, LOCATIONS & SALARIES										
	Career Centers						Resource Centers				
Position Title	Staples	Mission	Kingsville	Alice	Beeville	Sinton	Rockport	Coastal Campus	Falfurrias (Satellite)	Position Totals	Salary/Range
Career Advisor I (CA I)	8		3	2	4	2				19	\$37,900-\$43,000
Customer Solutions Facilitator	1									1	\$40,000
Customer Solutions Representative (CSR)	4		1		1	2	1			9	\$36,000
Customer Support Specialist								1		1	\$36,000
Data Analyst, Business Solutions		1								1	\$45,000
Data Analyst, Continuous Improvement	1									1	\$42,000
Deputy Director, Business Solutions		1								1	\$68,000-\$73,500
Deputy Director, Operations & Partnerships	1									1	\$79,206
Fiscal Support Technician	2									2	\$41,500
Lead, Career Center	2		1		1					4	\$43,500
Lead, Continuous Improvement	1									1	\$46,400
Liaison, Business Solutions				1	1					2	\$48,000-\$50,800
Manager, Career Center	1		1		1					3	\$57,000-\$70,000
Manager, Continuous Improvement	1									1	\$61,000
Manager, Fiscal Operations	1									1	\$73,000
Manager, Human Resources	1									1	\$70,000
Manager, Youth Program	1									1	\$50,000
Managing Director	1									1	\$94,500
Office Coordinator II	1									1	\$37,000
Program Support Specialist (PSS)	4		1	1	1	1				8	\$37,500
Quality Assurance Specialist	2									2	\$42,500
Recruiter, Business Solutions		3	1			1				5	\$40,890
Supervisor, Business Solutions		1								1	\$52,500
Talent Development Coordinator	1									1	\$70,000
Total Contractor Staff										69	
TWC Positions											
Recruiter, Business Solutions		1								1	
WDS I - CSR	10		1	1	1					13	
WDS IV - Lead	1									1	
Total TWC Staff										15	
Total Coastal Bend Staff Positions:	Total										
Contractor Positions		69									
TWC Positions		15									
TEMP CSR Positions		4.5									
		88.5									

<sup>1</sup> Falfurrias traffic numbers are tracked via Kingsville Career Center.

<sup>2</sup> Rockport Center opened in May 2022 traffic numbers are N/A

## Historic Performance Expectations

Performance expectations are subject to change based on guidance from TWC. This information provides a snapshot of historical performance requirements expected by Workforce Solutions Coastal Bend. Targets are set at **100% (WIOA) and (Non-WIOA)** of TWC's contracted performance for WFSCB. Targets can be negotiated with specific extenuating circumstances.

<b>WIOA MEASURES</b> <b>Applies to Performance Measures by Program (Adult/DW/Youth).</b> <b>All Participants integrated measure consisting of TANF, SNAP, Choices, Wagner P.</b> <b>Program Year: October 1 – September 30</b>	Quarterly YTD			
	1st	2nd	3rd	4th
Employed Q2 Post Exit - Adult	72.70%	72.70%	72.70%	72.60%
Employed Q4 Post Exit - Adult	68.30%	68.30%	68.30%	76.40%
Credential Rate - Adult	65.40%	65.40%	65.40%	61.60%
Median Earnings Q2 Post Exit - Adult	\$5,000.00	\$5,000.00	\$5,000.00	\$6,600.00
Measurable Skills Gains - Adult	52.30%	52.30%	N/A	61.60%
Employed Q2 Post Exit - DW	73.50%	73.50%	73.50%	77.60%
Employed Q4 Post Exit - DW	77.10%	77.10%	77.10%	81.70%
Credential Rate - DW	70.00%	70.00%	70.00%	79.60%
Median Earnings Q2 Post Exit - DW	\$7,200.00	\$7,200.00	\$7,200.00	\$9,400.00
Measurable Skills Gains - DW	56.00%	56.00%	N/A	78.40%
Employed/Enrolled Q2 Post Exit - Youth	68.50%	68.50%	68.50%	68.10%
Employed/Enrolled Q4 Post Exit - Youth	80.25%	80.25%	80.25%	83.40%
Credential Rate - Youth	28.50%	28.50%	28.50%	48.20%
Median Earnings Q2 Post Exit - Youth	\$3,100.00	\$3,100.00	\$3,100.00	\$3,200.00
Measurable Skills Gains - Youth	22.80%	22.80%	N/A	81.30%
Employed/Enrolled Q2 Post Exit - All Participants	63.30%	63.30%	63.30%	68.10%
Employed/Enrolled Q2-Q4 Post Exit - All Participants	80.25%	80.25%	80.25%	83.40%
Credential Rate - All Participants	70.10%	70.10%	70.10%	70.90%
REEMPLOYMENT & EMPLOYER ENGAGEMENT MEASURES	Quarterly YTD			
Program Year: October 1 – September 30	1st	2nd	3rd	4th
Claimant Reemployment within 10 weeks	59.50%	59.69%	60.43%	59.70%
Employers Receiving Workforce Assistance (YTD)	3,268	3,268	3,268	3,262
TANF/CHOICES	Quarterly YTD			
Program Year: October 1 – September 30	1st	2nd	3rd	4th
Choices Full Engagement Rate	50%	50%	50%	50%

## **Expected Performance Measures (WIOA & Others)**

This document provides a basic idea of what performance may look like in BCY 2023. Performance is subject to change as more information becomes available.

Contracted TWC performance measures for BCY 2022 include but are not limited to:

### **WIOA Adult, Dislocated Worker, & Youth (Siloed)**

- Employed in Quarter 2 Post Exit
- Employed in Quarter 4 Post Exit
- Credential Rate
- Median Earnings Quarter 2 Post Exit

## **Reemployment & Employer Engagement**

### **Claimant Reemployment within 10 Weeks Number of Employers receiving Workforce Assistance TANF/Choices**

Choices Full Engagement Rate

## **Procurement Process**

The selection of an entity to enter negotiations for the management of WFSCB career center system consists of three phases:

### **1. Application Process**

Interested entities will submit an application for qualification as a career center management proposer. The application will include the organization's history, experience, performance and fiscal integrity, and an application narrative. Applications will be scored by an evaluation team using a standardized instrument. Entities with a score of 75 points and above "pass" the application phase and will be eligible to submit a proposal. The information provided in the application will also be used as a reference by evaluators to gauge demonstrated effectiveness in the proposal evaluation process.

### **2. Proposal Process**

Successful applicants will submit a proposal for management and operation of the WFSCB Career Center System. The proposal will address WFSCB goals, career center staffing, operations, program functions, employer and job seeker services, customer outcomes, quality of services, continuous improvement, managing data systems and budgets. Proposals will be reviewed and scored by an independent review team. An independent review team report will be presented to WFSCB's Executive/Finance Committee, Board of Directors, and CEO (Chief Elected Officials) Council. WFSCB reserves the right to have a best and final offer with the top two proposers. The results of the best and final offer, if needed, will be forward to the Board of Directors with a committee recommendation of selection for contract negotiations. Should those negotiations fail the next highest scoring proposer will be invited to negotiate a contract.

3. Pre-award review of the selected entity and successful contract negotiations

A pre-award review will be conducted by WFSCB staff and/or a contracted representative to determine the program and fiscal integrity of the entity and to verify proposal and application elements. Negotiations will be scheduled in Corpus Christi, Texas. Successful negotiations will result in a contract between WFSCB and the entity. Contract start date will be October 1, 2023.

WFSCB will consider a transition budget with the appropriate documentation.

Pre-award would be conducted to validate Demonstrated Effectiveness as listed in the Application Process. Evaluators will be provided with a summary of application scores and comments while evaluating proposals.

At completion of contract negotiations, the selected proposer will provide WFSCB with an operational plan that addresses career center system operation and the achievement of WFSCB goals.

Proposers not selected for contract consideration may request in writing a debriefing on their proposal's evaluation. The request must be submitted to WFSCB Point of Contact no later than five (5) business days after the receipt of the notice of non-selection.

## **Scoring Criteria**

### **Application Scoring Criteria are:**

- Financial Capacity 40 points – includes sound organizational structure, available resources, including financial capacity to work without cash advances; ability to pay disallowed costs from non-federal funds; administrative and fiscal accountability; cost allocation and indirect cost policies and procedures; audit issues; pending litigation; claims on insurance; status of question costs, historical overhead costs (cost category 709) to contract and identify what specific cost makes up the overhead costs and the methodology for allocating those costs.
- Management Capacity and Demonstrated Effectiveness 60 points – includes organization history; organization chart; career center system management experience; and staff qualification.

Successful performance against TWC program performance measures and contract measures; attaining financial benchmarks in previous contracts; listing of historical and current contracts and status of each contract; compliance with program requirements as well as local, state and federal policies and regulations as evidenced by monitoring reports and corrective actions; timely, responsive and successful remedies to corrective action plans, performance improvement plans and sanctions, and monitoring findings.

Applications must receive an average rating of at least 75 points from the evaluation team to be considered eligible to submit a proposal. Applicants will be notified of the status of their application no later than May 30, 2023.

### **Proposal Scoring Criteria are:**

- Proposed Career Center Management and Operations 25 points - Demonstrated understanding of the one-stop career center system model and service delivery;

integrity of proposed systems; vision, mission and philosophy; design and approach for organizing and staffing the career center system; incorporation of WFSCB goals and objectives into the career center system management and proposal design; staff training & development; career center continuous improvement process (How will workforce centers be managed and operated.);

- Program Operations and Service Delivery 25 points -  
Strategies for delivering the requested programs and services; description of all program components, processes and outcomes; proposed outreach strategies and outcomes for all customers; business services strategies; youth program strategies; creative and innovative strategies for improving quality and delivery of program services (How will program services be delivered?);
- Budget/Cost 25 points\* -  
Evaluation of proposed costs in terms of relevance to requested services, customer needs, cost reasonableness, and budget management; auditable in-kind/cash contributions; cost reasonableness, and budget management; auditable in-kind/cash contributions; allow-ability, allocate-ability, and accountability and comparison of costs to other proposals; clear budget narrative explaining and justifying all costs; cost allocation plan and error free budget.
- Interview with WFSCB Leadership Team 25 points -  
The top two (2) finalists (this number may change depending on how close the scores are) will be invited to make a verbal presentation of their proposals and address questions from WFSCB.

*\*Note on Budgets: The funding estimate made available by WFSCB for preparing a budget is based on current funding levels.*

*The budget should separate all oversight costs from operational costs and should include a methodology for allocating costs based on funding. Any costs to maintain facilities outside WFSCB's workforce centers will be considered contractor's overhead costs. Proposers will thoroughly describe how they propose to allocate overhead staff costs.*

- Historically Underutilized Businesses (HUBs) 5 points -  
Documented certified HUB with completed HUB certification sheet from appropriate state agency will receive 5 points.

## **Procurement Schedule**

RFP Issue Date	April 3, 2023, 2:00 pm
Pre-Proposal Conference	April 10, 2023, 10:00 am
Question Period	April 3 - 24, 2023, 5:00 pm
Q&A Document Posted	April 27, 2023, 5:00 pm

<b>Applications Due</b>	<b>May 22, 2023, 4:00 pm</b>
Notice of Application Status	May 30, 2023

<b>Proposals Due</b>	<b>June 26, 2023, 4:00 pm</b>
Proposal Evaluation Period	June 27 – July 21, 2023
Executive/Finance Committee Meeting	July 27, 2023
Notifications of Award/Non-Selection	July 31, 2023

All times indicated above are Central Daylight Savings and dates are subject to change. Interested parties shall be responsible for monitoring the WFSCB website at <https://www.workforcesolutionscb.org/about->



[us/procurement-opportunities/](https://www.workforcesolutionscb.org/about-us/procurement-opportunities/) for any updates pertaining to this solicitation. WFSCB will not be held responsible for any further communication beyond updating the website.

### **Pre-Proposal Conference**

A Pre-Proposal Conference to explain or clarify this RFP and to answer other questions will be held at the administrative offices of WFSCB, **400 Mann Street, Suite 800, Corpus Christi, TX 78401** on the date and time stated in the schedule above. **Attendance at this conference is not mandatory, but it is strongly recommended.** Parties unable to attend in person may participate virtually from a computer, tablet, or smart phone via Zoom:

#### **Join Zoom Meeting**

<https://us02web.zoom.us/j/87570695931?pwd=ZGw5ZkQzQTlvSFBmRmZvdTIHeUIRQT09>

US Toll-Free: 888 475 4499

Meeting ID: 875 7069 5931

Passcode: 576836

The Pre-Proposal conference offers prospective proposers the opportunity to obtain guidance on the scope and nature of the work required in this RFP or to ask other technical questions concerning this solicitation. All questions from the conference and corresponding answers will be included on the Q&A Document posted to the WFSCB website.

### **Question and Answer Period**

WFSCB shall accept written, emailed and faxed questions during the period stated in the schedule above. Questions will not be accepted after the deadline. All questions and answers will be posted in a Q&A Document on the Procurement Opportunities page of the WFSCB website at <https://www.workforcesolutionscb.org/about-us/procurement-opportunities/>. Questions should be addressed to:

Workforce Solutions Coastal Bend  
Attn: Esther Velazquez, Contracts and Procurements Specialist  
400 Mann Street, Suite 800  
Corpus Christi, TX 78401  
Fax: 361 855.3057

Other than written questions submitted to the designated individual, proposer, or any agent or representative of proposer shall not undertake any activities or actions to promote or advertise their qualifications or submissions to any staff member of WFSCB, WFSCB's Board of Directors, WFSCB's CEO Council or their respective staff persons, at any time between the date of release of the RFP and the date of award of a contract by WFSCB. This restriction extends to "thank you" letters, telephone calls, emails, text messages and any contact that results in the direct or indirect discussion of the RFP, application and/or proposal submitted by proposer. Violation of this provision by proposer or any agent of proposer may lead to disqualification from consideration.

## **General Submission Instructions**

**Applications must be received by 4:00 P.M. on May 22, 2023.** Detailed instructions for submitting the Application begin on page 31.

**Proposals must be received by 4:00 PM on June 26, 2023.** Entities notified that their application has passed will be allowed to submit a Proposal. Detailed instructions for submitting the Proposal begin on page 55.

Applications and Proposals may be submitted electronically or in paper form. If submitted in paper, an electronic version must also be submitted. Paper submittals must be originals with all forms and certificates containing original wet signatures. Electronic versions must contain e-signatures and include a single PDF file for the response document and a single Excel file for the proposed budget. Any differences between the original paper version and the electronic version are the liability of the respondent. Applications and Proposals which do not adhere to the submission requirements, will be ruled unresponsive to the specifications, and will not be considered under this procurement.

Paper versions may be submitted by mail, courier service or hand delivered to:

Esther Velazquez, Contract and Procurement Specialist  
Workforce Solutions Coastal Bend  
400 Mann Street, Suite 800  
Corpus Christi, TX 78401

Electronic versions should be submitted via email to: [esther.velazquez@workforcesolutionscb.org](mailto:esther.velazquez@workforcesolutionscb.org).

or via SharePoint to:

[https://wscostalband-my.sharepoint.com/:f/g/personal/shileen\\_lee\\_workforcesolutionscb\\_org/Epqzj3CRq59Hp6ggOqr85eUBC9xiUrTe\\_m0nmrlseyTUEg?e=v2VkRP](https://wscostalband-my.sharepoint.com/:f/g/personal/shileen_lee_workforcesolutionscb_org/Epqzj3CRq59Hp6ggOqr85eUBC9xiUrTe_m0nmrlseyTUEg?e=v2VkRP)

**Faxed and/or late Applications and Proposals will be ineligible and not accepted for consideration.**

All Applications and Proposals will be received and recorded by WFSCB no later than the respective deadlines. Official receipt of Applications and Proposals submitted will be by entry on a document receipt log. A receipt form will be issued upon request. Proposers who mail an application or proposal will be sent a copy of the receipt form upon request.

### **Proposal Format and Preparation:**

The original proposal must be typed, single spaced and completed on 8½ x 11 inch plain white paper, with all pages, except the cover page, sequentially numbered (including attachments) and unbound. Please do not use less than a 12-font and leave at least a 1-inch margin on all sides.

The responses must contain all required attachments and materials in the order shown on the Application and Proposal submission lists. Note that during the respective review, documentation regarding submission of all attachments/certifications will be verified; quality of completeness of the submission will be the sole responsibility of the proposer. Points will be deducted during the scoring process for omission of required information.

## GENERAL INFORMATION & ADMINISTRATIVE REQUIREMENTS

### QUALIFICATIONS OF PROPOSERS

#### A. ELIGIBLE PROPOSERS

Businesses and organizations that currently provide or have previously provided career center management services are encouraged to respond to this RFP. Organizations possessing the capacity and demonstrated ability to perform successfully under the terms and conditions of a contract with the Board may respond to this RFP. Eligible organizations include but are not limited to private businesses, private-for-profit corporations, business organizations, public entities, community-based organizations, faith-based organizations, non-profit organizations, and other qualified providers.

WFSCB is prohibited from awarding a contract to a party excluded from federal procurement or non-procurement programs by the U.S. General Services Administration.

Minority, disadvantaged and women-owned businesses that are certified as Historically Underutilized Businesses by the Texas Services Commission are encouraged to respond to this RFP.

#### B. CONTRACTOR COMPETENCY

Proposers shall have a working knowledge and experience with all applicable laws, rules, regulations, standards, policies, and plans pertaining to the programs and services solicited by this RFP. Proposer may find information regarding WIOA through the DOL website at [www.doleta.gov](http://www.doleta.gov) and childcare through U.S. Department of Health & Human Services at [www.hhs.gov](http://www.hhs.gov). Information on other programs, laws, rules, regulations and policies can be found through the TWC website at <http://www.twc.state.tx.us>. A copy of WFSCB's Integrated Plan may be obtained at WFSCB's web site:

[www.workforcesolutionscb.org](http://www.workforcesolutionscb.org)

The selected contractor is responsible for having the technical, managerial, and administrative competencies and capabilities in all areas necessary to ensure programmatic and fiscal management systems are implemented effectively and efficiently to meet and/or exceed all applicable performance outcomes of the program(s) under this RFP. The selected contractor shall be responsible for having the financial resources and stability to meet high standards of public service and fiduciary responsibility.

The contractor will be required to assume full responsibility, including all risks and hazards, for all activities and services in the contract. At least 10% of the funds of the potential contract must be protected through bonds, insurance, escrow accounts, cash on deposit, or other methods to secure the funds consistent with the rule. Such funds should be separate from funds already secured for current contracts and/or other potential contracts.

#### C. PROPOSAL LIAISON

Each proposer must designate a responsible person within the proposer's organization as the proposal liaison. This individual must be familiar with the capabilities of the proposing organization, knowledgeable of the response and have the authority to negotiate contractual terms and conditions on behalf of the proposing organization.

#### D. ORGANIZATIONAL STRUCTURE

Proposer must have an established organization and structure in place before submitting a proposal. The proposer may be a joint venture option (i.e. partnership or consortium), where two or more entities submit a joint proposal. A lead agency, which is the prime contractor and fiscal agent, for contracting, financial management, and assumption of overall liability, must be identified. The commitments, roles and responsibilities of all parties must be established in advance and specified in a written and executed agreement, which must be included in the response to this RFP. WFSCB reserves the right to have such written agreements reviewed by its legal counsel. Such proposals may be determined non-responsive if legal documents are not presented for review, if they do not pass legal review, and/or they are not legally binding. All joint venture parties must submit their respective Application Forms 1–13 and Attachments, A through U, as part of the overall Application (see pages 31 and 32).

Entities may propose as a turn-key operation wherein the management, operations and personnel functions are controlled by the organization (i.e., staff will be employees of the contractor) or a managing director/professional employer organization, or employer of record model.

In a managing director/PEO model, the contractor is solely responsible for oversight, management, supervision, criminal background checks, firing, training, promoting, demoting, evaluating, and coordinating all employees' benefits and payroll with a PEO. The human resource's function related to staffing shall be conducted by the contracted PEO, who will be the employer of record for all center staff. Management decisions regarding staff shall be at the discretion of the Managing Director. **The Managing Director/PEO partnership must be in place prior to submitting a proposal.**

#### E. SELF-MONITORING

Proposers must have a system for self-monitoring, including the review of key information on how the organization is functioning (both management and staff functions), and maintaining fiscal and program compliance with applicable laws, rules, regulations and policies, contract terms and conditions, and contracted performance measures.

#### F. SUBCONTRACTING

Any subcontracting must be specified in the proposal narrative and approval must be granted by WFSCB prior to the execution of any contract resulting from this RFP. All subcontracting is subject to applicable federal, state, and local laws, rules, regulations, and policies governing procurement. If a proposer submits plans to subcontract any of the services and activities to be provided, the proposer must indicate which services and activities will be subcontracted and the rationale behind using subcontractors instead of providing the services directly. The proposer must also describe how subcontractors were (or will be) procured and selected, their qualifications, and the basis for payments. Subcontractors are subject to the same requirements as the proposer under this RFP and resultant contract. All subcontractor parties must submit their respective Application Forms 1–13 and Attachments, A through U, as a part of the overall Application.

## G. OUTSTANDING MONITORING, AUDIT OR LEGAL CONCERNS

Proposers must disclose any pending or remedied monitoring and/or audit concerns from any of the proposer's programs prior to receiving a contract resulting from this RFP. Additionally, proposers must disclose whether there are any legal judgments, claims, arbitration proceedings, or suits pending or outstanding against the organization or its officers. **Please submit as Attachment I and N to the Application.**

## CONTRACT INFORMATION

### A. TYPE OF CONTRACT

WFSCB will negotiate a cost reimbursement contract. If the proposer is a for-profit entity, profit targets will be incorporated into the contract. The Contractor will report expenditures on a modified accrual basis; however, will not be reimbursed for accruals. Performance earnings and payments may be negotiated based on federal, state and/or local performance measures and outcomes, and may include performance holdbacks and/or incentives. Profit (for-profit entities only) will be paid based on the attainment of negotiated performance benchmarks over the course of the contract. WFSCB will pay for client/customer training and support services. In the event, work experience wages are paid the contractor will procure a third party to process the payments or pay those costs from their payroll system. WFSCB will allow advance payments in accordance with the Uniform Administrative Requirements and TWC FMGC Chapter Seven. Advance payments must be limited to the minimum amounts needed and timed to be in accordance with the actual and immediate cash requirements of the entity in carrying out the approved sub-award's purpose. The amount and timing of cash advances will be agreed upon in sub-award negotiations.

### B. CONTRACT PERIOD AND RENEWAL

It is the intent of WFSCB to execute a contract for the development and delivery of contracted services for the Coastal Bend WDA. The initial intended contract period should begin on **October 1, 2023**, and end on **September 30, 2024**. WFSCB may annually opt to extend the term of a contract for up to three (3) additional one-year periods based on availability of funds, evaluation of contractor program and fiscal performance and compliance, and successful contract negotiations. Any annual contract extension shall be at the sole discretion of WFSCB and shall be based upon WFSCB's evaluation of contractor's performance and compliance under the terms and conditions of the contract.

WFSCB reserves the right to early termination of this contract, including but not limited to, loss in funding, convenience, non-performance, underperformance, and/or non-compliance.

### C. ADDITIONAL FUNDING

WFSCB reserves the right to negotiate the expansion of any contract to include other workforce programs, services, and funding, as WFSCB deems necessary and appropriate to carry out its mission, even if not specifically mentioned within this RFP.

## GOVERNING PROVISIONS AND LIMITATIONS

Violation of any of the following provisions may cause a proposal to be disqualified and rejected from consideration.

- A. The purpose of this RFP is to ensure uniform information in the solicitation of proposals for the procurement of services under Workforce Development programs to include but not limited to: Workforce Innovation and Opportunity Act (WIOA), TANF-Choices, SNAP E&T and Wagner-Peyser.
- B. This RFP is not to be construed as a purchase agreement, contract or as a commitment of any kind; nor does it commit WFSCB to pay for any costs incurred in the preparation of such a response, or prior to the execution of a formal contract unless such costs are specifically authorized in writing by WFSCB.
- C. WFSCB reserves the right to accept or reject any or all proposals received, to cancel or reissue this RFP in part, or its entirety.
- D. WFSCB reserves the right to award a contract(s) for any services solicited in this RFP in any quantity WFSCB determines is in its best interests.
- E. WFSCB reserves the right to extend or shorten, increase or decrease any contract awarded as a result of this RFP.
- F. WFSCB reserves the right to request additional information, clarification of or explanation for any aspect of a response to this RFP, both for the application and/or the proposal.
- G. WFSCB reserves the right to waive any defect in this procurement process or to correct any error(s) and/or make changes to this solicitation it deems necessary. WFSCB will provide notifications of any changes in this RFP to all proposers recorded in WFSCB's official distribution log and receipts record as having requested or received a copy of this RFP.
- H. WFSCB reserves the right to negotiate the final terms of all contracts or agreements with selected proposer and any such terms negotiated because of this RFP may be renegotiated and/or amended to successfully meet the needs of WFSCB and the Coastal Bend WDA.
- I. WFSCB reserves the right to contact any individual, agency, employer or granting agency listed in a proposal, contact others who may have experience and/or knowledge of the proposer's relevant performance and/or qualifications; and to request additional information from all proposers.
- J. WFSCB reserves the right to conduct on-site reviews of records, systems, procedures, including credit and criminal background checks, etc. of any entity selected for funding under this RFP. This may occur either before or after the award of a contract or agreement. Any misrepresentation, intentional omission, or falsification of information regarding the proposer's ability to perform as stated in the RFP response may result in the cancellation of any contract or agreement awarded.

- K. Any entity selected for funding under this RFP will be subject to a pre-award survey. This will include, but not be limited to, a review of the proposer's record keeping procedures, key staffing qualifications, management systems, accounting and administrative systems and procedures. Pre-award surveys may occur prior to contract negotiations.
- L. WFSCB reserves the right to withdraw or reduce the amount of an award or to cancel any contract or agreement resulting from this RFP if adequate funding is not received by WFSCB from the TWC or other funding sources or due to legislative changes.
- M. Proposers shall not, under penalty of law, offer or provide any gratuities, favors or anything of monetary value to any officer, board member, employee, proposal evaluator, or agent of WFSCB or elected official for purposes of having an influencing effect on this procurement.
- N. Proposers shall not attempt in any manner to advocate for, lobby or otherwise attempt to influence any officer, board member, employee, proposal evaluator, chief elected official, or agent of WFSCB or elected official for purposes of having an influencing effect on this procurement. Violation of this provision will result in immediate rejection of the entity's proposal.
- O. No officer, board member, employee, proposal evaluator, or agent of WFSCB shall participate in the selection, award or administration of a contract supported by workforce development funds if a conflict of interest, or potential conflict, is involved.
- P. The proposer shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a proposer's proposal to be disqualified and rejected. This does not preclude joint ventures or subcontracts.
- Q. All proposals submitted must be an original work product of the proposer. The copying, paraphrasing or other use of substantial portions of the work product of another party if submitted hereunder as original work of the proposer shall not be accepted but deemed non-responsive.
- R. The contents of a successful proposal may become a contractual obligation if selected for the award of a contract. Failure of the proposer to accept this obligation may result in cancellation of an award. No plea of error or mistake shall be available to successful proposers as a basis for release from proposed services at the stated price/cost. Any damages accruing to WFSCB as a result of a successful proposer's failure to contract for the proposed services may be recovered from the proposer.
- S. A contract with a selected proposer may be withheld, at the sole discretion of WFSCB, if issues of contract or questions of non-compliance, questioned/disallowed costs, audit/monitoring findings, unresolved financial obligations, or legal issues exist, until such issues are satisfactorily resolved. WFSCB may withdraw the award of a contract if resolution is not satisfactory to WFSCB.
- T. The solicitation and selection of proposals must conform to all relevant federal, state, and local laws, regulations, rules, and policies governing the procurement of supplies, equipment, and services. Proposers are responsible for familiarizing themselves with such matters.
- U. WFSCB is exempted by law from payment of Texas Sales Tax and Federal Excise Tax.

## ADMINISTRATIVE REQUIREMENTS

WFSCB will provide any training and/or technical assistance necessary for contractors regarding the policies, documents, and procedures that are specific to the awarded contract. Proposers must possess the knowledge, experience, expertise, professional judgment, and capacity within their organization to perform the services and activities requested under this RFP.

- A. Management and Oversight (Cost Category 709) costs may be allocated to programs if supported by appropriate documentation demonstrating the benefit to the program for that expenditure, and in accordance with the TWC Financial Manual for Grants and Contracts. All costs allocated to Management and Oversight are to be fully explained in the budget narrative, and the cost will be capped at 10% of direct wages excluding wages for Management and Oversight costs regardless of any approved indirect rate and subject to negotiations.
- B. Profit is an allowable cost. Profit is only available as a budget line item for a for-profit organization. Profit is limited to no more than 10% of direct wages excluding wages for Management and Oversight, but in no event shall it be excessive. The amount of profit will be tied to the achievement of negotiated performance benchmarks. The payment of profit will be negotiated as a separate item during contract negotiations.
- C. Contractors must have the financial resources or the ability to obtain them sufficient to meet their cash flow needs for at least four-to-six-weeks.
- D. Contractors will be required to procure all insurances required by this RFP and to list WFSCB as an additional insured on each policy prior to the commencement of any work pursuant to a contract executed because of this RFP. Contractors will be required to carry general liability insurance coverage sufficient to cover any liability that may arise from the performance of a contract. General liability must cover bodily injury and property damage to a third party and personal injury; \$500,000 for each occurrence or \$1,000,000 aggregate is required. A reasonable deductible is allowed, but not to exceed \$5,000 per occurrence.

Contractors must maintain liability insurance, which covers Directors and Officers of the organization.

Contractors must maintain errors and omissions insurance coverage. Contractors must provide on-site accident/medical insurance for program participants enrolled in activities and services not covered by worker's compensation.

If a contractor or their employees use motor vehicles in conducting business under a contract resulting from this RFP, liability insurance covering bodily injury and property damage must be provided through a commercial insurance policy. Such insurance shall provide a minimum coverage of \$100,000 liability per occurrence; \$300,000 aggregate liability; \$100,000 property damage; personal injury protection; uninsured motorist protection; and a maximum of a \$500 deductible.

If a contractor or their employee use privately owned motor vehicles in conducting business under a contract resulting from this RFP and the contractor has policies and/or procedures that require



their employee to provide self-motor vehicle insurance policy, the contractor policy and/or procedures must be submitted. Such insurance and vehicle shall meet or exceed the Texas Minimum Coverage in accordance with Texas motor vehicles law and regulations. No participant may be transported in a privately-owned vehicle with such insurance. Contractor must maintain records regarding current driver's license and proof of insurance for all staff.

If self-insured, the contractor must warrant that it will maintain coverage sufficient to cover any liability specified above that may arise from performance under a contract resulting from this RFP.

If a contractor warrants that it is a state agency and that it is self-insured, then the contractor must be able to pay any obligation that is incurred under the terms of a contract resulting from this RFP, including any liability, which may arise from performance under a contract.

Contractors must ensure that all employees are covered by Worker's Compensation or an equivalent work-related injury insurance.

The Contractor shall ensure that at least 10% of the funds subject to its control are protected through bonds, insurance, escrow accounts, cash on deposit, or other methods to secure the funds consistent with TWC Contracting Rules, Subsection C Preamble and Rules Adopted by TWC 03-16-04. The Contractor may, consistent with said subsection, use any method or combination of methods to meet this requirement. Such funds should be separate from funds already secured for current and/or other potential contracts.

Contractors will be required to provide WFSCB with copies or originals of all certificates demonstrating proper insurance coverage and letters of credit for each contract held. Contractors must also include WFSCB as an additional Certificate Holder on all required insurance coverage.

- E. Selected proposers must agree to cooperate with WFSCB in the development and implementation of collaborative partnerships with community partners in coordinating Workforce programs and services for maximization of local resources. This includes cooperation and coordination as may be requested or required by WFSCB under any Memorandum of Understanding (MOU) or other agreement entered by and/or for WFSCB. Submit a current list of other agencies you have developed agreements with as **Attachment T to the Application**.
- F. Contractors will be required to work with WFSCB on any expansion, change or alteration to the Workforce Solutions Center system or individual centers that may occur during the term of a contract.

The Selected proposer must have an annual audit in compliance with Uniform Administrative Requirements, 2 CFR Part 200 Cost Principles and Audit Requirements for Federal Awards; Final Rule (formerly, OMB (Office of Management and Budget) Circular A-133).

- G. A contractor may arrange for a single, organization-wide audit of its programs that will include a financial and compliance audit of state or federally funded programs under WFSCB's contract, provided it is consistent with the criteria found in the TWC's Financial Manual for Grants and Contracts, and WFSCB agrees prior to the audit process.

WFSCB reserves the right to conduct or cause to be conducted an independent audit of all funds received under a Board contract, notwithstanding the requirements above. A local government audit staff, a certified public accounting firm, or other auditors that WFSCB designates may perform the audit. Such audit will be conducted in accordance with applicable federal rules and regulations, contractual guidelines, and established professional standards and practices. The proposer shall submit a copy of their organization's audits for the three most recent fiscal years. Please submit as **Attachment M to the Application**.

- H. Proposers must have a cost allocation plan and a method for indirect costs, if applicable, as required by regulations governing multiple funding sources.
- I. Contractors must agree to comply with TWC and WFSCB's policies, directives, communication and outreach guidelines and plans.
- J. All non-expendable property purchased under a contract resulting from this RFP shall be the property of WFSCB. Purchases of property must comply with Board policies and may require prior review and approval from WFSCB and TWC.

All workforce-applicable purchases (i.e., office supplies) must be procured by the Contractor in compliance with all applicable federal, state, and local laws, rules and regulations, and policies.

- K. Contractors are subject to compliance and performance monitoring. At any time during normal business hours, and as often as deemed necessary, WFSCB, TWC, DOL, U.S. Department of Health and Human Services or any of their duly authorized representatives shall have complete access to any books, invoices, payrolls, time sheets, or any other records or papers which are related to a contract resulting from this RFP for the purpose of verifying program and financial performance and compliance with all applicable laws, rules, regulations, and policies.
- L. Contractors are required to input automated data in a timely and accurate manner, and to maintain the accuracy and integrity of said data and reports in accordance with federal, state, and local policies and regulations. Contractors are also required to protect client confidentiality and ensure the security of client data in hard copy and/or electronic files.
- M. Contractors secured from this RFP are considered sub-recipients as defined in the Governor's Uniform Grant and Contract Management Standards and the TWC Financial Manual for Grants and Contracts. WFSCB may refer to the agreement between itself and the service organization as a "grant" or "contract", although it will be understood to be a sub-grant for services, and all federal or state requirements applicable to sub-recipients will apply to Board contractors.
- N. Contractors must comply with applicable cost principles and administrative requirements set out in Uniform Administrative Requirements and TWC's Financial Manual for Grants and Contracts.
- O. Contractors will be required to prepare and maintain client and financial records in accordance with instructions provided by TWC and WFSCB. Contractors will be required to retain all records of a program year for a minimum of three years past the date upon which WFSCB accepts a grant/contract closeout.
- P. Contractors shall provide reports of several types and scope in the format and frequency as determined by WFSCB and/or its funding source(s)

- Q. Contractors assure and guarantee that it will comply fully with the non-discrimination and equal opportunity provisions of WIOA, Title I, including but not limited to: Section 188 of the Workforce Investment Act (WIOA); Titles VI of the Civil Rights Act of 1964, as amended; Section 504 of the Rehabilitation Act of 1973, as amended; the Age Discrimination Act of 1975, as amended; Title IX of the Education Amendments of 1972, as amended; and the Non-Traditional Employment for Women Act of 1991. Nondiscrimination of the Workforce Innovation & Opportunity Act (WIOA) and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR parts 37.20. The United States has the right to seek judicial enforcement of this assurance.
- R. Private non-profit organizations and agencies of state or local government responding to this RFP must include the following: 1) a resolution from the proposer's governing body or board authorizing the submission of a proposal; and 2) a letter of transmittal from the chief executive officer of the proposer's organization. Private for-profit corporations submitting a proposal must include a statement signed by an authorized representative of the corporation authorizing submission of a proposal.
- S. Under Texas Government Code sec. 552.003, WFSCB is subject to the Texas Public Information Act and the information provided in response to this Request for Proposals will be made accessible to the public. If a proposer believes that any information contained in its proposal qualifies for an exception to the Public Information Act, the proposer must indicate in the proposal which information should be exempted from the Act and the grounds for the exemption. If there is a request for this information under the Public Information Act, WFSCB will make a good faith effort to inform the proposer of the request for access to the information and process said request in accordance with applicable state laws which may include referral to the state Attorney General for determination of compliance with the Texas Public Information Act.

WFSCB is the responsible authority for handling complaints or protests regarding the proposal review and selection process. This includes, but is not limited to, disputes, claims, protests of award or non-selection for award, or other matters of a contractual or procurement nature. Matters concerning violation of law shall be referred to such authority, as may have proper jurisdiction.

Once the Workforce Solutions Board of Directors has agreed upon selection(s), all proposers will be notified in writing of the results within ten (10) working days of the decision.

- T. Prohibited Technologies: In accordance with the Governor's directive, all individuals joining meetings virtually or visiting WFSCB facilities in person, must adhere to the required Model Security Plan for Prohibited Technologies that seeks to protect the State's sensitive information and critical infrastructure from technology that poses a threat to the State of Texas. Prohibited devices may include cellular telephones, laptops, tablets, desktop computers, and other devices capable of internet connectivity. For a complete list of prohibited devices and apps please reference: <https://dir.texas.gov/information-security/prohibited-technologies>.
- U. Cyber Security: Contractor's cyber security standards will adhere to the Texas DIR standard, NIST, TWC WD Letters and include but are not limited to Texas Government Code 2054.077.

## **Debriefing and Appeal Process**

**STEP 1: Request for Debriefing** - Proposers not selected by this procurement process may appeal the decision by submitting, within five (5) business days of the receipt of notification of the procurement decision, a written Request for Debriefing to obtain information on the procurement process and how proposal/offer was received and ranked. (NOTE: A debriefing is offered as a courtesy to any bidder or proposer who is not selected for funding.)

**STEP 2: Debriefing** - The purpose of the debriefing is to promote the exchange of information, explain the proposal evaluation system, and help unsuccessful proposers understand why they were not selected. Debriefings are provided to help the proposer improve any future proposal submissions. The debriefing will consist of a review of the proposer's proposal evaluation and an explanation for the score received in the proposal review process.

**STEP 3: Written Notice of Appeal** - If, after the debriefing, the proposer wishes to continue to file an appeal, they will be required to notify WFSCB's President/CEO, in writing, within fifteen (15) days from the date of the original notification of non-selection. The complainant's letter must specify the nature of the appeal and any desired remedies of action. WFSCB reserves the right to determine whether the appeal is valid and merits further consideration.

**STEP 4: Formal Hearing** - Upon receipt of the letter of appeal, the WFSCB Board of Directors Chairperson or their designee shall contact the proposer to arrange for an appeals conference to be held within thirty (30) days of the notice of appeal. The appeals conference shall be held at a designated place and at a date and time to be mutually acceptable to both parties. An Appeals Committee shall conduct the Appeals Conference and shall consist of the Board Chairperson (or designee) who shall chair the committee, the Council Board Vice Chairpersons (or designees) and two staff persons appointed by the Board Chairperson. If, after a full review, a simple majority of the Committee votes to have the Board reconsider, the issue will appear on the agenda at the next regularly scheduled Board meeting.

Protests not resolved to the satisfaction of the protesting party may be pursued through the TWC.

Please note that TWC Financial Manual for Grants and Contracts, Chapter 14, Section 14.1, provides for limited appeals of any Board decisions:

*"The Commission shall accept no protest or dispute appeal until all administrative remedies at the contractor level have been exhausted. Commission appeal review is limited to the following:*

- *Violations of federal law and regulations,*
- *Violations of State or local law shall be under the jurisdiction of State or local authorities, and*
- *Violations of contractor's protest/dispute procedures or failure to review a protest or dispute shall be referred to such authority as may have proper jurisdiction."*

### **Authority**

As applicable, contracts awarded because of this RFP shall fully comply with all federal, state, and local laws, rules, regulations, and policies including those identified below:

- Workforce Innovation and Opportunity Act (WIOA) (Pub. L. 113-128)
- U.S. Department of Labor Employment and Training Administration 20 CFR Parts 603, 651, 652, et al. Workforce Innovation and Opportunity Act; Final Rule
- Workforce Investment Act of 1998 [Public Law 105-220]; Section 188; and federal regulations 20

- CFR Parts 652 and 660 through 667; (replaced by WIOA)
- Workforce Investment Act Final Rule Part 37; (replaced by WIOA final rule)
- Portions of the Social Security Act [42USCA §301, et seq.];
- The Food Stamp Act of 1977 [7 USC §2000 et seq.]; federal regulations 7 CFR 271 through 273;
- Personal Responsibility and Work Opportunity and Reconciliation Act of 1996 (PRWORA) [Public Law 104-193];
- Wagner-Peyser Act of 1933, as amended;
- Federal regulations issued by the U.S. Department of Health and Human Services at 45 CFR Parts 270 through 275, inclusive, for services funded by Temporary Assistance to Needy Families; federal regulations 45 CFR Part 260 through 265;
- Federal regulations issued by the U.S. Department of Agriculture at 7 CFR 271 through 273, Food Stamp Employment Training services;
- Federal and state laws and regulations concerning nondiscrimination and equal opportunity;
- Federal and state labor laws and standards;
- Non-traditional Employment for Women Act of 1991, as amended;
- Titles VI and VII of the Civil Rights Act of 1964, as amended;
- Section 504 of the Rehabilitation Act of 1973, as amended;
- The Age Discrimination Act of 1975, as amended;
- Title IX of the Education Amendments of 1972, as amended;
- Americans with Disabilities Act of 1990, as amended;
- Texas Senate Bill 642 and House Bill 1863;
- Sections of the Texas Administrative Code Title 40, Part 20 and the Texas Government Code Chapter 2308, as they pertain to workforce center systems, operations and programs;
- Childcare 45 CFR Parts 98 and 99;
- 29 Code of Federal Regulations 37.35 and 37.8, Implementation of the Nondiscrimination and equal Opportunity Provision of the WIA, revised July 1, 2000;
- TWC WD Letter 18-07;
- Department of Health and Human Services Office of Civil Rights, Policy Guidance, entitled “Title VI’s Prohibition Against National Origin Discrimination as it Affects Limited English Proficiency Persons” and issued August 29, 2000;
- Department of Labor, Civil Rights Center, Policy Guidance entitled “Enforcement of Title VI of the Civil Rights Act of 1964; Policy Guidance on the Prohibition Against National Origin Discrimination as it Affects Persons with Limited English Proficiency,” and issued January 17, 2001;
- Department of Health and Human Services Office of Civil Rights, Summary of Policy Guidance, entitled “Prohibition Against Discrimination on the Basis of Disability in the Administration of Temporary Assistance for Needy Families,” and issued January 19, 2001;
- Department of Health and Human Services Office of Civil Rights, Decision Against Massachusetts Department of Transitional Assistance regarding Office of Civil Rights Complaint Number 01-98-3055, and issued January 19, 2001;
- TWC WD Letter 24-01, Prohibition Against Discrimination Based on Disability or Limited English Proficiency in the Administration of Workforce Services; and
- Rules, policies, and plans of the TWC and WFSCB related to workforce center systems, operations, and programs.

Many of the above items can be found on-line at either [www.twc.state.tx.us](http://www.twc.state.tx.us) or [www.hhs.gov](http://www.hhs.gov). Workforce Solutions policies and plans are available upon request. Proposers are expected and presumed to be knowledgeable of all applicable federal, state, and local laws, rules, regulations, and policies.

## FUNDING

Funding for all activities and services under this RFP may be provided under various state and federal funding sources. Funding is contingent on and subject to change based upon the allocation and receipt of such funds by WFSCB from the TWC. All funding obtained from this solicitation shall be in accordance with the Texas Administrative Code, Fiscal Integrity Provisions, Title 40, Part 20, Chapter 801, Subchapter C, Rule 801.54.

The actual amount of a contract award will be based on the proposed budgets, availability of funds, and the standards for the use of public funds (i.e., all costs must be reasonable and necessary to carry out the planned functions, allowable, and allocable to the proper grant/cost categories). The proposal(s) most responsive to this RFP and advantageous to WFSCB in terms of quality and cost will be recommended for contract negotiations.

### Approximate Available Funds for 10/01/2023 – 09/30/2024

Program	Total
WIOA Adult	1,224,179
WIOA Additional Adult and DW **Ends 6/30/02022	230,000
WIOA Dislocated Worker	1,216,604
WIOA Youth ISY	309,595
WIOA Youth OSY	928,786
WIOA Rapid Response	26,026
TANF	1,684,083
SNAP E&T	445,871
SNAP E&T- ABAWD	109,879
Non-Custodial Parent (NCP)	123,295
Trade Act Services for Dislocated Workers	18,412
Military Family	42,730
VET (TVC)	6,000
WCI RWY <sup>3</sup>	12,000
WCI TVLP	7,476
WCI YOU Choose	-
WCI Short-Term Child Care Training 6/30/23	61,110
Resource Administration Grant	6,923
NDW / Covid ***New end date 3/2023	120,000
Wagner-Peyser Employment Services <sup>2</sup>	32,813
Reemployment Services & Eligibility Assessment	401,336
Externships for Teachers	-
Apprenticeship Texas ****1/31/2023	4,355
Child Care - Fund 2373 <sup>1</sup>	45,473
WIOA Middle Skills Employment Supplies	61,749
<b>Total</b>	<b>\$ 7,118,695</b>
1. Child Care Allocation of shared cost for Telephone Operator and Janitor Expenses	
2. Funds available for ES Staff <b>only</b> (mileage, professional development, etc.)	
3. Funds available for Red, White, & You Job Fair costs (venue, food, etc.)	
4. *See individual end dates	
Transitional budget, if necessary, will be covered in contract negotiations.	

## **APPLICATION INSTRUCTIONS**

### **Application for Management and Operation of Career Center System (Including Youth Services)**

**Due Date: May 22, 2023 by 4:00 PM (CDT)**

This Application for career center system management for WFSCB is intended to be a process whereby qualified entities are identified and determined to have the expertise and experience to operate a career center system. Entities successfully completing the Application phase of the procurement process will be invited to submit a Proposal for career center system management.

#### Instructions:

Applications must be received by 4:00 P.M. on May 22, 2023. Entities who have been notified that their application has passed will be allowed to submit a Proposal.

Applications may be submitted electronically or in paper form. If submitted in paper, an electronic version must also be submitted. Paper submittals must be originals with all forms and certificates containing original wet signatures. Electronic versions must contain e-signatures and be a single PDF file. Any differences between the original paper version and the electronic version are at the liability of the applicant.

Note: Joint venture partners must each submit all forms and requested materials pertaining to their organization or company as part of the single PDF file.

Applications which do not adhere to the submission requirements, will be ruled unresponsive to the specifications, and will not be considered under this procurement.

Paper versions may be submitted by mail, courier service or hand delivered to:

Esther Velazquez, Contract and Procurement Specialist  
Workforce Solutions Coastal Bend  
400 Mann Street, Suite 800  
Corpus Christi, TX 78401

Electronic versions should be submitted via email to: [esther.velazquez@workforcesolutionscb.org](mailto:esther.velazquez@workforcesolutionscb.org)

or via SharePoint to:

[https://wscostalbend-my.sharepoint.com/:f/g/personal/shileen\\_lee\\_workforcesolutionscb\\_org/Epqzi3CRq59Hp6ggQqr85eUBC9xiUrTe\\_m0nmlseyTUEg?e=v2VkRP](https://wscostalbend-my.sharepoint.com/:f/g/personal/shileen_lee_workforcesolutionscb_org/Epqzi3CRq59Hp6ggQqr85eUBC9xiUrTe_m0nmlseyTUEg?e=v2VkRP)

**Faxed or late Applications will be ineligible and not accepted for consideration.**

**Forms:**

- 1) Application for Career Center System Management Form
- 2) Copy of Certificate for Historically Underutilized Business (if applicable)
- 3) Completed Application Check List Form
- 4) Application Narrative
- 5) Financial Systems Survey
- 6) Certification By Proposer Form
- 7) Administrative Management Form
- 8) Certifications Regarding Lobbying, Debarment, Suspension and Other Responsibility Matters, and Drug Free Workplace Requirements
- 9) Certification Regarding Conflict of Interest, Disclosure of Interest
- 10) Texas Corporate Franchise Tax Certification
- 11) State Assessment Certification
- 12) Orientation to Complaint Procedures
- 13) Undocumented Worker Certification
- 14) Customer Rights and Complaint Resolution Procedure

**Attachments:**

- A. Organization Chart for the Applicant Organization
- B. Proposed Organization Chart for the Operation and Management of Coastal Bend Career Centers
- C. Joint Venture Agreement/and/or Managing Director/PEO agreement, if applicable (if applicable).
- D. List of Organization's Board of Directors, Owners, or Principals
- E. Resumes for key the staff (if employed or known), up to date with current positions included; labeled: (per staff person whether full or part time, or in-kind)
  - (1) Administrative/Management Team
  - (2) Supervisory Staff for career center on-site supervisory staff only
- F. Job Descriptions and Required Qualifications for each proposed funded position.
- G. Provide a chronologic list of all current or past workforce-related contracts for the last 10 years (most recent first). Include the name of the board area, the specific contract title and number, the total amount of the contract awarded, and the percent expended, start and end dates of each contract.
- H. For each contract listed in G, above, provide a table showing actual performance against contracted performance for each TWC performance measure and each contracted measure by year for the last 3 years minimum.
- I. A copy of monitoring reports from the contracting workforce board, to include monitoring conducted by board-contracted monitors, or the last three contract years for each career center system management contract as generated and imposed by any Workforce Board, TWC, State or Federal agency. (No Summaries); In addition, provide any follow-up and final resolution reports for any findings or deficiencies identified in the monitoring reports.
- J. A copy of any primary funding source reports regarding Corrective Action Plans as generated and imposed by any Workforce Board, TWC, State, or a federal agency, over the last three years, and the status of these plans. (No Summaries)
- K. A copy of any primary funding source reports regarding Performance Improvement Plans as generated and imposed by a Workforce Board, TWC, State, or a federal agency, over the last three years, and the status of these plans. (No Summaries)
- L. A copy of any primary funding source reports regarding Sanctions as generated and imposed by a Workforce Board, TWC, State, or Federal Agency, over the last three years, and the status of these sanctions. (No Summaries)
- M. Audits with management letters for the last three years, plus a financial statement for the current year. In the event the entity is part of a larger organization, the financial statements must include a



breakout by Workforce Development Contract and applicable cost categories as described in WD Letter 04-15, Change 2.

- N. Provide documentation of any legal judgments, claims, arbitration proceedings, and suits pending or outstanding against the organization or its officers.
- O. Cost allocation plan
- P. Indirect cost rate and approval of rate – if applicable
- Q. Certificate of non-profit incorporation – if applicable
- R. IRS Form 990 (for 501 (c) (3) non-profit organizations)
- S. Copy of annual report to shareholders for for-profit companies
- T. List of agencies which have MOUs (Memorandum of Understanding) with your organization.
- U. List of three (3) references with requested information. Please submit as Attachment U to the Application.

## COVER PAGE

### Application for Management and Operation of Career Center System

A. Identification of Proposer:

Name of Organization: \_\_\_\_\_

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

Contact Person Regarding this Proposal: \_\_\_\_\_

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

E-Mail Address: \_\_\_\_\_

B. Name and Title of Person Responsible for:

Contracting Authority: \_\_\_\_\_ / Contract Negotiations: \_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_\_

Liaison to WFSCB: \_\_\_\_\_ / \_\_\_\_\_

C. Description of Proposer (Legal/Tax status):

☐ Private, for-profit

☐ Public, non-profit

☐ Private, non-profit

☐ Corporation

☐ Partnership

☐ Sole Ownership

☐ Government entity

D. Model:

☐ Turnkey Operation

☐ Managing Director/PEO

☐ Other (Specify) \_\_\_\_\_

State Comptroller ID # \_\_\_\_\_ Federal Tax ID # \_\_\_\_\_

E. Please check if your firm is a Historically Underutilized Business as defined by the Texas Government Code 407.101.

☐ Yes (If "Yes" provide approved certification.)

☐ No

Signature of person who can commit organization to this application and proposal:

\_\_\_\_\_  
Typed Name of Representative

\_\_\_\_\_  
Typed Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Application Checklist

The items listed below should be submitted in the following order as the Application for Management and Operation of Career Center System due May 22, 2023 by 4:00 P.M. (CDT). Check each item included in your application.

### Forms:

- 1) ☐ Application for Career Center System Management Form
- 2) ☐ Copy of Certificate for Historically Underutilized Business (if applicable)
- 3) ☐ Completed Application Check List Form
- 4) ☐ Application Narrative
- 5) ☐ Financial Systems Survey
- 6) ☐ Certification By Proposer Form
- 7) ☐ Administrative Management Form
- 8) ☐ Certifications Regarding Lobbying, Debarment, Suspension and Other Responsibility Matters, and Drug Free Workplace Requirements
- 9) ☐ Certification Regarding Conflict of Interest, Disclosure of Interest
- 10) ☐ Texas Corporate Franchise Tax Certification
- 11) ☐ State Assessment Certification
- 12) ☐ Orientation to Complaint Procedures
- 13) ☐ Undocumented Worker Certification
- 14) ☐ Customer Rights and Complaint Resolution Procedure

### Attachments:

- A. ☐ Organization Chart for the Applicant Organization
- B. ☐ Proposed Organization Chart for the Operation and Management of Coastal Bend Career Centers
- C. ☐ Joint Venture Agreement and/or Managing Director/PEO agreement (if applicable).
- D. ☐ List of Organization's Board of Directors, Owners, or Principals
- E. ☐ Resumes for key the staff (if employed or known), up to date with current positions included; labeled: (LIMIT TWO PAGES EACH per staff person whether full or part time, or in-kind)
  - (1) Administrative/Management Team
  - (2) Supervisory Staff for career center on-site supervisory staff only
- F. ☐ Job Descriptions and Required Qualifications for each proposed funded position.
- G. ☐ Provide a list of all current or past workforce-related contracts for the last 10 years. Include the name of the board area, the specific contract title and number, the total amount of the contract awarded, and the percentage expended.
- H. ☐ For each contract listed in G, above, provide a table showing actual performance against contracted performance for each TWC performance measure by year for the last three years at minimum.
- I. ☐ A Copy of original monitoring report from your primary funding source for the last three contract years for each career center system management contract as generated and imposed by any Workforce Board, TWC, State or Federal agency. (No Summaries); In addition, provide any follow-up and final resolution reports for any findings or deficiencies identified in the monitoring reports.
- J. ☐ A copy of any primary funding source reports regarding Corrective Action Plans as generated and imposed by any Workforce Board, TWC, State, or a Federal agency, over the last three years, and the status of these plans. (No Summaries); See notes in I.

- K. ☐ A copy of any primary funding source reports regarding Performance Improvement Plans as generated and imposed by a Workforce Board, TWC, State, or a Federal agency, over the last three years, and the status of these plans. (No Summaries)
- L. ☐ A copy of any primary funding source reports regarding Sanctions as generated and imposed by a Workforce Board, TWC, State, or Federal Agency, over the last three years, and the status of these sanctions. (No Summaries)
- M. ☐ Audits with management letters for the last three years, plus financial a financial statement for the current year. In the event the entity is part of a larger organization, the financial statements must include a breakout by Workforce Development Contract and applicable cost categories as described in [WD Letter 04-15, Change 2: Cash Draw and Expenditure Reporting System Instructions—Update \(texas.gov\)](#)
- N. ☐ Provide documentation of any legal judgments, claims, arbitration proceedings, suits pending or outstanding against the organization or its officers.
- O. ☐ Cost allocation plan
- P. ☐ Indirect cost rate and approval of rate – if applicable
- Q. ☐ Certificate of non-profit incorporation – if applicable
- R. ☐ IRS Form 990 (for 501 (c) (3) non-profit organizations)
- S. ☐ Copy of annual report to shareholders for for-profit companies
- T. ☐ List of agencies which have MOUs with your organization.
- U. ☐ Provide three (3) references for projects of similar size and scope that they have performed. Reference's organization name, address, and phone number, name of contact person, and description of services provided, dates of relationship and total budget. Please submit as Attachment U to the application.

I have verified that all of the requested forms have been made available as a part of this application.

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

## APPLICATION NARRATIVE

Provide brief responses to the questions below. Any reference to attachments in the narrative must include the attachment name and page number.

1. Provide a brief history of your organization's experience operating career center systems.
2. Describe your organization's attributes that enhance your ability to provide the requested services.
3. Describe any innovative initiatives your organization developed, procured, or implemented to address employer or job seeker issues that demonstrate your expertise in workforce development.
4. Description of Fiscal Management System - Describe your financial management system including cash management and accrual system, budget tracking, financial capacity, and knowledge of staff;
  - a. Include the last three years of audited financial statements.
  - b. List your experience in managing and accounting for State and Federal funds, including sound organizational structure.
  - c. List names and qualifications of the organization's (proposal) chief fiscal officer and respective accounting staff.
  - d. Describe how payroll, leave and travel policies will be documented, and records will be maintained.
  - e. Describe what procedures and techniques will be used to ensure that there are no disallowed costs and identify sources from which disallowed costs would be paid.
  - f. Describe how you will comply in reporting to WFSCB in the respected cost category classification (WD Letter 04-15, Change 2) for all costs that the contractor is responsible for.
  - g. List the available resources, including financial capacity to work without cash advances for a limited time, (excess of current assets over current liabilities as indicated in the financial statements).
  - h. Discuss compliance with The Texas Administrative Code, Chapter 802.21.
  - i. Ability to pay disallowed costs from non-federal funds; administrative and fiscal accountability. Working capital should normally be at least 10% of the proposed contract.
  - j. Provide cost allocation and indirect cost policies and procedures;
  - k. Audit issues; pending litigation; claims on insurance; status of questionable costs,
  - l. Discuss historical overhead costs (cost category 709) to contract and identify what specific cost makes up the overhead costs and the methodology for allocating those costs. (See attached spreadsheet.)
  - m. Description of Applicants experience conducting self-monitoring for financial performance and compliance.
  - n. Submitted the organization's insurance documents including insurance binder, if applicable.
  - o. Describe how you will list Workforce Solutions as an additional insured on insurance.
  - p. Describe how expenditures and obligations incurred are tracked to ensure that expenditure levels will be met.
5. Management Capacity – includes organization history; organization chart; career center system management experience; staff qualifications; Applicant must demonstrate its capability to set direction, achieve outcomes, bring non-federal funding to the table, and manage overall operations, including staff oversight, customer services, continuous improvement, and achievement of measurable outcomes.
  - a. List the governing body/board of directors or other principals.
  - b. Describe lawsuits, if any initiated against the Applicants' organization or any of the project team members, within the last five years.

- c. List the organization's vision, goals, objectives, and describe how they relate to the Workforce Solutions strategic direction in workforce development.
- d. Provide a brief organizational/company history.
- e. Provide copies of the most recent IRS form 990(501)(c)(3) NON-PROFITS, for Profit: Proof of incorporation, corporate resolution.
- f. Provide a corporate organizational chart of the operations.
- g. Indicated the Number of employees in Nueces County, in the State of Texas and nationwide, corporate.
- h. Indicate the location of the office from which the administration or oversight is to be done.
- i. Submitted evidence that the Applicant has developed and implemented an equal opportunity program for hiring and promoting its employees.
- j. Description of Applicant's Corporate or Administrative Policies.
- k. Evidence that the Organization can meet the needs of all client types.

6. Demonstrated Effectiveness – Described the organization's history and experience in workforce development.

- a. Described the Applicant's knowledge, expertise, and experience in performing workforce or staffing. The Applicant demonstrated level of compliance with regulations and policies.
- b. Included Compliance or Monitoring Reports that demonstrate the organization or company's ability to meet programmatic and financial performance outcomes with similar services. (Reference Attachment I)
- c. Included performance reports for those contracts used as references sufficient to demonstrate the organization's ability to meet programmatic and financial outcomes with similar services. Example budget vs actual in non-client and client. (Reference Attachment H)
- d. Provided at least three (3) references for projects of similar size and scope that they have performed. Reference's organization name, Reference's address and phone number, Contact person, and Description of services provided, dates of relationship and total budget. Include this information on "Attachment U".

Submit all signed certifications, administrative and fiscal surveys, and appropriate documents

[Submit with Application]

## FINANCIAL SYSTEMS SURVEY

PROPOSER: \_\_\_\_\_

Please answer the following questions regarding your fiscal management system. Additional information may be requested at the time of a pre-award survey, including copies of the documents specifically named.

Question	Yes	No	N/A
Does your organization follow GAAP?			
1. Does your accounting system:			
a. Provide control and accountability for funds received, property, and other assets;			
b. Provide identification of receipt and expenditures of funds separately for each funding source;			
c. Provide adequate information to prepare monthly financial reports on an accrual basis;			
d. Have the capability to track allow-ability and allocation of costs in accordance with requirements for federal grant programs.			
2. Are state and federal funds which may be advanced to you deposited in a bank with federal insurance oversight?			
3. Has the bank in which you deposit state and federal funds insured the account(s) or put up collateral or both equal to the largest sum of money which would be in such account(s) at any one point in time during the contract period?			
4. Do you reconcile your bank accounts monthly?			
5. Are the bank reconciliations made by the same person who performs recordkeeping for receipts, deposits, and disbursement transactions?			
6. Do you record daily cash receipts and disbursement transactions?			
7. Do you maintain records on all property acquisition, disposition, and transfer?			
8. Do you have written procedures and internal controls established for the procurement of goods and services?			
9. Is a competitive bidding process incorporated into your purchasing procedures for acquisition of subcontractors, major goods and services, equipment, and office space?			
10. Are timesheets kept to support payroll disbursement?			
11. Are records maintained to support authorized employee leave (vacation, sick, etc.)?			
12. Are complete records kept to support travel payments?			
13. Has a formal audit by an outside auditing firm been conducted of your organization's financial record in the past year?			
14. Do you have an indirect cost plan with current approval by a cognizant agency?			
15. Is your organization funded by more than one source?			
16. Does your organization maintain written accounting procedures?			

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

[Submit with Application]

## CERTIFICATION BY PROPOSER

I hereby certify that the information contained in this proposal and all attachments is true and correct and may be viewed as an accurate representation of the proposed services to be provided by this organization. I certify that no employee, board member, or agent of Workforce Solutions Coastal Bend has helped prepare this proposal. I acknowledge that I have read and understood the requirements and provisions of the request for proposals and directives in this program's implementation.

I, \_\_\_\_\_, certify that I am the \_\_\_\_\_ of corporation, partnership, or sole proprietorship, or other eligible entity named as Proposer and Respondent herein and that I am legally authorized to sign this proposal and submit it to Workforce Solutions Coastal Bend, on behalf of said organization by authority of its governing body.

Person authorized to sign for the  
Organization:

Signature of Individual attesting to  
Signatory's authority:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Title

\_\_\_\_\_  
Printed Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Subscribed and Sworn to before me on this \_\_\_\_\_ day of \_\_\_\_\_ 2023, in

\_\_\_\_\_ (City), \_\_\_\_\_ (County), \_\_\_\_\_ (State).

Notary Public in and for \_\_\_\_\_ County, State of \_\_\_\_\_.

Commission expires: \_\_\_\_\_. SEAL



[Submit with Application]

## ADMINISTRATIVE MANAGEMENT SURVEY

PROPOSER: \_\_\_\_\_

Please answer the following questions regarding your administrative management system. Additional information may be requested at the time of a pre-award survey, including copies of documents specifically named.

Question	Yes	No	N/A
1. Does your organization have current Articles of Incorporation?			
2. Does your organization have written personnel policies?			
3. Do your written personnel policies contain procedures for:			
a. open employee recruitment, selection and promotional opportunities based on ability, knowledge and skills;			
b. providing equitable and adequate compensation;			
c. training of employees to assure high-quality performance;			
d. retaining employees based on the adequacy of their performance, and for making adequate efforts for correcting inadequate performance;			
e. assuring fair treatment of applicants and employers in all aspects of personnel without regard of political affiliation, race, color, national origin, sex, age, disability, religion, or creed, with proper regard for their privacy and constitutional rights as a citizen; and			
f. Assuring that employees are protected against coercion for partisan political purposes and are prohibited from using their official position to influence procurement.			
4. If your organization does not have the procedures noted above, could your personnel policies be revised expeditiously to include these procedures?			
5. Do your written personnel policies contain a prohibition against nepotism?			
6. Do your written personnel policies contain a prohibition against employees using their positions for private gain for themselves or other parties?			
7. Does your organization have an authorized, written travel policy for employees and authorized agents that provides for reimbursement for mileage and/or per diem at a specified rate?			
8. Does your organization have a written employee complaint procedure used to resolve disputes?			
9. Does your organization have the capacity or staff to produce and maintain records on project participants and/or other customers as well as other management information that may be needed?			
10. If certain costs are determined to be disallowed, does your organization have a procedure or source for reimbursing such costs to WFSCB?			
11. Does your organization have a State Comptroller Vendor Number?			
12. Is your organization governed by a Board of Directors, an elected body (city/county ISD council, commission or board) or Council?			
13. Does your organization operate under local rules or by-laws?			
14. Has your Board/Council reviewed and approved this proposal for submission?			
15. Does your organization have a current approved fidelity bond?			
16. Does your organization have an EEO/affirmative action plan?			
17. Does your organization have a complaint or grievance process for customers?			
18. Does your organization have a Complaint Monitor?			

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

*[Submit with Application]*

**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.
- 

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).

---

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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Printed Name of Authorized Representative

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Printed Title of Authorized Representative

---

Signature of Authorized Representative

---

Date

*[Submit with Application]*

**Coastal Bend Workforce Development Board  
DISCLOSURE OF INTEREST**

It is the fiscal policy of the Coastal Bend Workforce Development Board ("the Board") that all persons or firms seeking to do business with the Board 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 attach a separate sheet.**

1. State the name of each "non-managerial employee" of the Board 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:

<b>Name</b>	<b>Job Title and Section (if known)</b>
_____	_____
_____	_____

2. State the names of each "managerial employee" of the Board 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:

<b>Name</b>	<b>Title</b>
_____	_____
_____	_____

3. State the names of each "board member" of the Board 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 the Board 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	Title
_____	_____
_____	_____

#### 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 the Coastal Bend Workforce Development Board, as changes occur.

\_\_\_\_\_  
Printed Name of Certifying Person

\_\_\_\_\_  
Printed Title of Certifying Person

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

\_\_\_\_\_  
Date

*[Submit with Application]*

## TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

---

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations 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.

---

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.

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

*[Submit with Application]*

**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.

\_\_\_\_\_  
Printed Name of Certifying Person

\_\_\_\_\_  
Printed Title of Certifying Person

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

\_\_\_\_\_  
Date

*[Submit with Application]*

**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 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  
400 Mann St., Suite 800  
Corpus Christi, Texas 78401  
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) 463-2400; (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 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 TWC's resolution of your complaint, you may file a complaint, it 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:

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

*{Submit with Application}*

**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 applying 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.

If 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.

\_\_\_\_\_  
Printed Name of Certifying Person

\_\_\_\_\_  
Printed Title of Certifying Person

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

\_\_\_\_\_  
Date

*{Submit with Application}*

## **CUSTOMER RIGHTS AND COMPLAINT RESOLUTION PROCEDURE WORKFORCE SOLUTIONS COASTAL BEND**

Participating in workforce services administered by the Texas Workforce Commission (Commission) or Workforce Solutions of the Coastal Bend (Board) grants you the right to file a complaint regarding your workforce services. These rights are guaranteed through the Commission's complaints, hearings and appeals procedures\* at 40 TAC, Chapter 823.

Please be aware that this complaint process does not pertain to matters alleging violations of nondiscrimination or equal opportunity requirements under the Workforce Innovations and Opportunity Act (WIOA) or matters governing job service related complaints.

### **THE COMPLAINT PROCESS**

#### **What is a complaint?**

A complaint is a written statement alleging a violation of any law, regulation, or rule relating to any federal- or state-funded workforce service. If you have received an adverse action or want to file a formal complaint about workforce services you are first encouraged to discuss the adverse action or complaint with Texas Workforce Center staff where the complaint originated.

#### **Who may file a complaint?**

Texas Workforce Center customers – Individuals who have applied for or are eligible to receive federal- or state-funded workforce funded services administered by the Commission or the Board. These services include:

- Child Care Services
- Temporary Assistance for Needy Families (TANF) / CHOICES
- Supplemental Nutrition Assistance Program (SNAP) Employment & Training
- Workforce Innovations and Opportunity Act (WIOA) - Adult, Dislocated Worker, and Youth
- Eligible Training Providers receiving WIOA funds or other funds for training services.
- Other interested parties affected by the Texas workforce system, including subrecipients. These individuals may be child care or other service providers that have received a written statement issued by the Board, a Texas Workforce Center, or the Agency relating to an adverse action, or a provider or contractor, related to denial or termination of eligibility, under programs administered by the Agency or the Board.
- Previously employed individuals who believe they have been displaced by a Texas Workforce Center customer participating in work-based services such as subsidized employment, work experience, or workfare.

#### **How do I file a complaint?**

- Complaints must be in writing using the attached complaint form.
- Complaints must be filed within 180 days of the alleged violation.
- Complaints should be filed at the service level where the complaint originated for optimal and immediate satisfaction.

Board complaint procedures are available upon request.

#### **How will the complaint be resolved?**

- You will be given the opportunity for an informal resolution to resolve any disputes resulting from either a complaint or an appeal to a determination. An example of an informal resolution may include:
  - Meeting with your immediate case worker to seek a resolution;
  - Meeting with a Texas Workforce Center manager or designated Board staff for a more in-depth discussion related to the circumstances of the complaint and to discuss how the complaint may be resolved.

- If you are not satisfied with the outcome of the informal resolution, you have the right to file a complaint and to have the opportunity for a Board hearing with:

Workforce Solutions of the Coastal Bend  
520 N. Staples  
Corpus Christi, Texas 78401

- Once a complaint is filed with the Board, you will be notified in writing of a Board hearing at least (10) ten calendar days prior to the hearing date. The ten-day notice may be shortened with prior written consent of the parties involved.
- A Board decision will be issued within 60 calendar days from the date the complaint is originally filed.

If you do not agree with the decision issued by the Board or if no decision is mailed within 60 calendar days from the date the complaint was originally filed, you may file a written appeal to the Commission. The appeal must be sent within 14 calendar days after the mailing date of the Board's decision or 90 calendar days after the original filing date of the complaint. Appeals to the Commission are mailed to:

Appeals, Texas Workforce Commission  
101 East 15th St., Room 410  
Austin, Texas 78778-0001

The Secretary, US Department of Labor will investigate appeals under the following circumstances:

- Local-level grievances and complaints—when a state-level appeal is filed and within 60 days of that request, either party appeals to the Secretary.
- State-level complaints:
  - when no determination is made at the state level within 60 days of receipt of the state-level complaint; or
  - when a decision on a state-level grievance or complaint has been reached and the party to which the decision is adverse appeals to the Secretary.

And those who wish to appeal a final state-level determination of the following:

- Appeals to the Secretary, that are based on a state-level determination not being made within 60 days of receipt of a grievance or complaint, must be filed within 120 days of filing the grievance or appeal with the state.
- Appeals to the Secretary that are based on a party's dissatisfaction with the decision of the state-level appeal must be filed within 60 days of receipt of the state-level decision.
- Appeals to the Secretary must be submitted by certified mail with a return receipt requested. In addition to sending an appeal to the Secretary, the party must also simultaneously provide a copy of the appeal to the opposing party and the US Department of Labor Employment and Training Administration (DOLETA) regional administrator.
- The Secretary must make a final decision on an appeal no later than 120 days after receiving the appeal.

Secretary, US Department of Labor  
200 Constitution Ave. NW  
Washington, DC 20210  
Attention: ASET

Regional Administrator, DOLETA  
525 S. Griffin Street, Room 317  
Dallas, Texas 75202

By my signature below, I certify I have received a copy of the Workforce Customer Rights and Complaint Resolution Procedure.

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

*[Submit with Application]*

**ATTACHMENT U - REFERENCES FORM**

Failure to provide and include the following information with your response by the submission date 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 a timely manner 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 (how many years provided services (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 (how many years provided services (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 (how many years provided services (To/From) Dates	

## PROPOSAL INSTRUCTIONS

### Proposal for Management and Operation of Career Center System (Including Youth Services)

**Due Date: June 26, 2023 by 4:00 PM (CDT)**

The proposal for Management and Operation of WFSCB's Career Center System is intended to be the proposing entity's approach to operating the career center system in a manner to exceed contracted performance measures, provide quality services to customers, be accountable for all compliance requirements, and represent WFSCB and its goals and objectives for workforce development in the Coastal Bend WDA. Any or all parts of the proposal may become a part of the contract, if selected. Therefore, the proposal should be realistic in its portrayal of the proposer's abilities and expertise.

**Instructions: Proposals must be received by 4:00 PM on June 26, 2023.**

Proposals may be submitted electronically or in paper form. If submitting in paper, an electronic version must also be submitted. Paper submittals must be originals with all forms and certificates containing original signatures. Electronic versions must contain e-signatures and include a single PDF file for the response document and a single Excel file for the proposed budget.

Note: Joint venture partners must each submit a signed statement stating they support the proposal and their role in the proposed approach for management and operation of the career center system. The signed joint venture statement must be part of the single PDF file.

Any differences between the original paper version and the electronic version are at the liability of the proposer. Proposals which do not adhere to the submission requirements, will be ruled as unresponsive to the specifications and will not be considered under this procurement.

Paper versions may be submitted by mail, courier service or hand delivered to:  
Esther Velazquez, Contract and Procurement Specialist  
Workforce Solutions Coastal Bend  
400 Mann Street, Suite 800  
Corpus Christi, TX 78401

Electronic versions should be submitted via email to: [esther.velazquez@workforcesolutionscb.org](mailto:esther.velazquez@workforcesolutionscb.org).  
or via SharePoint to:

[https://wscostalbend-my.sharepoint.com/:f/g/personal/shileen\\_lee\\_workforcesolutionscb\\_org/Epgzi3CRq59Hp6ggQqr85eUBC9xiUrTe\\_m0nmrlseyTUEg?e=v2VkrP](https://wscostalbend-my.sharepoint.com/:f/g/personal/shileen_lee_workforcesolutionscb_org/Epgzi3CRq59Hp6ggQqr85eUBC9xiUrTe_m0nmrlseyTUEg?e=v2VkrP)

**Faxed or late Proposals will be ineligible and not accepted for consideration.**

## COVER PAGE

### Proposal for Management and Operation of Career Center System

D. Identification of Proposer:

Name of Organization: \_\_\_\_\_

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

Contact Person Regarding this Proposal: \_\_\_\_\_

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

E-Mail Address: \_\_\_\_\_

E. Name and Title of Person Responsible for:

Contracting Authority: \_\_\_\_\_ / Contract Negotiations: \_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_\_

Liaison to WFSCB: \_\_\_\_\_ / \_\_\_\_\_

C. Proposal Summary Data:

Proposed Total Budget Amount: \_\_\_\_\_

Proposed Cash or In-Kind Contribution: \_\_\_\_\_

Proposed Total Amount for Staff Salaries and Fringe: \_\_\_\_\_

Proposed Total Amount for Direct Participant Training/Services: \_\_\_\_\_

Proposed Total Number of Staff FTEs: \_\_\_\_\_

Model Approach: ☐ Turnkey Organization ☐ Managing Director/PEO

Signature of person who can commit organization to this proposal:

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date



## PROPOSAL CHECKLIST

The items listed below should be submitted as the proposal for career center system management due **June 26, 2023, 4:00 p.m.** Check each item included in your proposal.

- ☐ Proposer Cover Page (Front Page of Proposal)
- ☐ Proposal Checklist
- ☐ Proposal Narrative
- ☐ Proposal Budget (A, B, C and D)
- ☐ Attachments
  - ☐ A. Proposed Organization Chart (if different from Application)
  - ☐ B. Staff Training Matrix
  - ☐ C. Job Seeker Customer Flowchart
  - ☐ D. Employer Customer Flow Chart

I have verified that all of the requested information is contained in this proposal.

\_\_\_\_\_  
Printed Name of Authorized Representative

\_\_\_\_\_  
Printed Title of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

## PROPOSAL NARRATIVE INSTRUCTIONS

Instructions: Repeat each instruction in the proposal narrative including the corresponding section heading and section number and letter and provide a thorough response. Exhibits may be referenced in the narrative and provided in the attachments. Any references to attachments in the narrative must include the name of the attachment and the page number.

### Proposed Management and Operation of Career Center System

#### A. Management & Staffing

1. Describe your proposed approach to managing the Coastal Bend career center system.
2. Management is the process of planning, organizing, leading and controlling all phases of business operation in order to achieve the objectives of our organization. Describe the objectives of your organization and your proposed approach for each of the following elements:
  - a. Management style
  - b. Business objectives
  - c. Initial On-boarding/Training & On-going Staff Skills Development
  - d. Team-Building, Morale & Incentive Plans, and Leadership Development
  - e. Staff Accountability
  - f. Communication (Internal & External)
  - g. Anticipating and planning for changes in the business environment
  - h. Outreach & Coordination with partners and grantor agencies
3. Describe each of the following in detail:
  - a. Management team and the structure for supervision of career center system staff.
  - b. Proposed staffing of the Coastal Bend career center system. Include in your discussion the staffing for each center. Explain/justify why you propose this staffing structure. Provide a staffing chart which includes TWC ES staff.
  - c. Staff development strategies to support continuous learning and development of career center staff. Provide a staff development matrix as Attachment B that lists your proposed training for staff. Include the source of the training for each topic. Include orientation and training for new staff as well as development of skills of current staff.
  - d. Employee benefits you will provide to career center staff. Include eligibility date, cost to program and cost to employee.
  - e. Your organization's code of conduct for career center and management staff.
  - f. Process for assessing customer satisfaction and how that information is processed.
  - g. Proactive continuous improvement/quality assurance processes for career center systems operation. Include the use of information and data to support key career center system management processes and improve performance.
  - h. Reactive corrective action processes for addressing any deficiencies identified through internal or external monitoring. Discuss each of the following:
    - i. Internal process for identifying and resolving program and compliance issues.

- ii. Response to internal/external monitoring findings, corrective action plans performance improvement plans, and/or sanctions.
- iii. Ensure the accuracy and integrity of data and information.
- iv. Evaluate the value of career center products and services offered to customers.

4. Managing Director with Professional Employer Organization (PEO) Option: (If applicable)

Managing Director Proposers must respond to the following narrative questions as an addition to responding to all the above criteria questions:

- (1) Describe the procurement for the professional employer organization (PEO) or staff leasing company to include dates, proposals received, and the entity selected.
- (2) Describe the PEO's approach to the following functions:
  - a. Benefits management
  - b. Payroll services
  - c. Human resources management
  - d. Paid time off
- (3) Provide a description of how the PEO's staff will interact with the Managing Director of the workforce center system. Please provide the name of the single point of contact for these services.

Managing Director's must complete the PEO's section of the proposal Budget (PEO Budget).

B. Communication and Outreach

WFSCB expects service providers to work with each other and WFSCB Communications department in a team effort to develop regional marketing products (e.g., event ads, brochures, posters, signage, promotional items), to provide event and activity support for each other (e.g., job fairs, open houses) and to promote general internal system communications. All service providers are required to comply with WFSCB's Strategic Marketing Standards and Guidelines which set specifications for all communication, public relations and outreach activities. The document is available at:

[https://www.workforcesolutionscb.org/wp-content/uploads/2017/01/WFSCB\\_StrategicMarketingStandards-Guidelines\\_Jan-2020\\_UPDATED.pdf](https://www.workforcesolutionscb.org/wp-content/uploads/2017/01/WFSCB_StrategicMarketingStandards-Guidelines_Jan-2020_UPDATED.pdf)

Please address the following elements:

- 1. Your strategies for ensuring compliance with WFSCB's communication and outreach standards and guidelines.
- 2. How your marketing plan is implemented and delivered to effectively communicate WFSCB's goals and complement WFSCB's Strategic Marketing Standards and Guidelines.
- 3. Your communication procedures (internal and external) to ensure that information is delivered in a timely and efficient manner to all levels of employees, customers, potential customers, and other constituencies.
- 4. Your procedures to quickly address crises situations, or emergencies that impact employees, customers, potential customers, and other constituencies.

### C. Proposed Program Service Delivery

For your proposed service delivery approach, identify and briefly describe what you believe to be the key processes that are essential to the delivery of high performance, customer focused services in an efficient and effective manner and how do you propose to implement those key processes.

Submit customer flowcharts clearly identifying all services available through the career center system for job seekers and employers, the service-specific decision points for customers within the system, and the potential outcomes of or benefit to customers receiving one-stop and/or program services.

#### 1. Employer Services

##### a. How will you:

- i. Involve employers to ensure an employer-driven system throughout the region.
- ii. Ensure services are available to and used by employers; include appropriate staffing levels and explanation.
- iii. Identify employer needs and respond to employer expectations?
- iv. Expand the use of WorkinTexas.com, Career Coach, and other TWC web-based resources by employers and job seekers?
- v. Ensure you will provide on-going employer feedback to assist WFSCB in identifying the skills and competencies inherent in high-growth, high-demand jobs, and identify gaps between current and projected skill needs?
- vi. Assist WFSCB in developing solutions to workforce skills gaps and challenges through partnerships between industry leaders and educational institutions.
- vii. Utilize existing TWC Employment Services staff in providing employer services?

##### b. Describe:

- i. Specific strategies you will implement to exceed WFSCB's Employer Performance measures.
  - a. Specifically discuss the Employers Receiving Workforce Assistance rate, its definition, and operationalize your process to exceed the performance goal.
  - b. Organizational benchmarks beyond those of WFSCB's.
  - c. Innovative ideas and proven strategies that will increase performance.
- ii. Your organization's capacity to develop, deliver and/or implement strategies for:
  - a. Targeting employers by industry type and size, and job seekers and youth customers by education and work experience, and to assist WFSCB in coordinating such efforts in the region.
  - b. Actively coordinating with business and economic development organizations in the region. Include in your discussion interactions with the organizations and projected outcomes of these relationships to include existing board development activities such as Site Selection programs and Business Retention & Expansion activities.
  - c. Process/screening systems to ensure the quality of job matches and referrals of qualified candidates to employers using WorkinTexas.com.
  - d. Coordinating employer services with job seeker services and program activities.
  - e. Coordinating employer services with youth services and activities.
  - f. Successful implementation of fee-for-service activities.
  - g. Implementing apprenticeship services for new or existing registered apprenticeships
  - h. Implementing fidelity bonding and WOTC services.

## 2. Job Seeker & Program Services

This two-part question serves as your opportunity to showcase all aspects of customer/job seeker service delivery. Each of the populations listed below can be addressed in each lettered elements below.

Describe your strategies for each of the following topics and incorporate program-specific service delivery strategies and staffing models, address key program elements (i.e. 14 WIOA Youth Program elements), flow charts and any innovative approaches with examples that have proven successful in the following areas:

- |   |                          |
|---|--------------------------|
| a. Outreach/Recruitment                                     | e. Case Management       |
| b. Resource Room, Information, Triage and Referral Services | f. Job Search            |
| c. Intake/Eligibility                                       | g. Job Development       |
| d. Assessment   | h. Training Activities   |
|   | i. Support Services      |
|   | j. Follow Up & Retention |

Describe your strategies to integrate all programs and resources available through the career centers to meet the needs of all job seekers and to serve customers with significant barriers to employment throughout the region. Populations to be addressed include but are not limited to:

- |   |  |
|---|--|
| • General Job Seekers   | • Long term unemployed                   |
| • Veterans & their spouses  | • Public Assistance recipients           |
| • UI Claimants  | • Non-Custodial Parents                  |
| • Dislocated Workers  | • Referrals from community organizations |
| • Individuals in need of training (AEL, post-secondary, and employment related) | • Individuals with disabilities          |
|   | • Youth (in & out-of-school)             |

## 3. Program Oversight and Data Collection

- a. Elaborate on management oversight processes to include staff accountability and data integrity to ensure program compliance and successful outcomes for all populations addressed in question 2.

- b. Discuss experience with Cabinet, Gazelle, and any other paperless systems.

## 4. Performance Attainment

- a. Describe each performance measure listed in the Expected Performance Measure section on page 14 of this document and explain your strategies to exceed contracted performance targets. Include specific service delivery processes that enable customers to attain their education and employment goals, ultimately impacting performance.

#### D. Transition Plan

Discuss your plan for a smooth transition of career center management from the current operator to your organization (or to a different organization if you are the current contractor). The transition plan should address:

1. Describe the activities required of each party for the transition of career center management.
2. Describe the process to minimize the disruption of service to customers and for notification of customers, training providers, each of the career center partners, community organizations etc. about the change of career center operator.
3. Discuss your strategy for assessing current career center staff, any proposed probationary period, recruiting any needed additional staff, and negotiating salaries and benefits.
4. Provide a proposed timeline for all transition activities.

#### E. Proposed Fiscal Approach and Budget

The funds available from WFSCB for this RFP are based on current funding levels. The proposed budget will not include any carryover funds. Facility-related costs, such as rent, copier leases, copier paper, and janitorial and security services should not be budgeted. The Contractor will need to budget for office supplies. A complete explanation and documentation of "overhead costs" and what costs make up overhead costs will be required. Any costs for staff that are not housed at WFSCB facilities should be considered overhead costs (cost category 709).

The proposal must delineate all costs that are for staff not cost allocated or not located in the centers operated by WFSCB and paid by other funds.

All management costs and oversight costs must be separate from operational costs and the methodology for allocating those costs based on funding (e.g., percentage of a base or indirect base).

1. Describe how you will comply with the cost allocation codes in developing your budget and reporting expenditures. Explain in detail the cost that will be allocated for Management and Overhead of the contract (Cost Category) and how you will ensure the allocated amount will not exceed the respective management and overhead percentage limit in the proposal. Explain how you will adjust your management and overhead budget to consider any increase or decrease if there is a change in funding.
2. How will you ensure that at least 30% of the WIOA operating budget is for direct client expenditures? In addition, please explain the process you will use to track and monitor client expenditures and coding of expenditures into TWIST. Please give details on the staff involved and how often reports will be reconciled into board payments and ensure that caps are not exceeded.
3. Describe how you will forecast expenditures for direct client services and address how you will track ITA payments.
4. Describe employee benefits you will provide to career center staff. Include eligibility date, associated costs and estimate cost to employee.

5. Describe how you will integrate any grants and other special projects into the service delivery system pool of resources.
6. Describe any cash or in-kind contributions you are offering in your proposal. Please indicate cash or in-kind contributions on the budget forms where appropriate. For in-kind contributions please state the source and how the amount/value was calculated.
7. Include a proposed budget narrative explaining all calculations and provide a justification for each expenditure. Note: Any expense for staff and related costs that are not housed in Board facilities will be coded as Management and Oversight and must be reflected accordingly in the budget, to include any payroll related costs which should be broken out in the detailed explanation of your proposed budget. Submit your proposed budget on the forms/spreadsheets provided.

## PROPOSAL BUDGET INSTRUCTIONS

Budget forms are contained in a separate MS Excel file. Complete the Budget forms as follows:

Note: Sub-recipient's administration costs are captured under cost category 709. WFSCB requires a breakout of all administrative costs including local staff directly charged to the grants and PEO fees, if applicable. WFSCB pays, on behalf of the contractor, participants' costs (excluding 617 work experience and 616 Transitional jobs) Reference WD Letter 04-15, Change 2. In addition, any indirect administration costs considered programmatic must be listed separately.

- (A) **Summary Budget by Funding Stream-** Please complete the Budget Summary provided.
- (B) **Line-Item Budget-** Please list all costs associated with the proposed program and requested from WFSCB on this Line-Item Budget form. Include In-Kind or Cash Costs paid for by your organization or others on the next to last line, and the total costs of proposed program on the bottomline.
- (C) **Line-Item Budget by Funding Stream-** Please include information requested on the Budget Back-Up pages. Each cost element must be reasonable, allowable under regulations, and necessary to operate the proposed program.
- (D) **Staffing Salaries** – Present each proposed staff position and the funding amount in the appropriate fund source column. Positions charged to Code 709 should be budgeted in the appropriate section as indicated on the form.
- (E) **Note: Budget forms must be submitted as a part of the proposal submission. All budget forms must be provided in both PDF and MS Excel formats.**

**Note: Budget forms will be available as MS Excel files and can be accessed via Workforce Solutions website <https://www.workforcesolutionscb.org/about-us/procurement-opportunities/> or at this hyperlink: [https://wscostalband-my.sharepoint.com/:x/g/personal/shileen\\_lee\\_workforcesolutionscb\\_org/ESKSxvI4XSZLIbKCysIGYv4BPJ9BKUadnwnXYf1fniN0gg?e=RAdbPB&CID=9F3B2D23-FCE3-46FF-BAD9-416816462224&wdLOR=c7EDD2280-D1B3-4E07-ACF9-B0985F0A9F12](https://wscostalband-my.sharepoint.com/:x/g/personal/shileen_lee_workforcesolutionscb_org/ESKSxvI4XSZLIbKCysIGYv4BPJ9BKUadnwnXYf1fniN0gg?e=RAdbPB&CID=9F3B2D23-FCE3-46FF-BAD9-416816462224&wdLOR=c7EDD2280-D1B3-4E07-ACF9-B0985F0A9F12)**