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Request for Proposal
#22-WIOA-01
One Stop Operator:
Center Management & Business Services

Funded by:
Title I of the Workforce Innovation and Opportunity Act of 2014

Program Year 2023
(July 1, 2023 – June 30, 2024, with extension options)

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An Equal Opportunity Employer / Program

RFP RESPONSE DUE DATE: January 9, 2023, 1:00PM (EST)

This Workforce Innovation and Opportunity Act bid solicitation is fully supported by the Employment and Training Administration of the U.S. Department of Labor as part of awards totaling \$800,000.

RFP Release Date: November 21, 2022

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PART 1: INTRODUCTION AND BACKGROUND

A. Announcement

The WorkLink Workforce Development Board (WorkLink WDB) and Upper Savannah Workforce Development Board (Upper Savannah WDB) are jointly soliciting proposals from interested and qualified entities (public, private, or non-profit) to serve as the One-Stop Operator (OSO) with focus areas of Service Delivery, Center Management, and Business Services, funded by Department of Labor (DOL) federal funds under the Workforce Innovation and Opportunity Act (WIOA) (Public Law No: 113-128).

Geographic Service Area

WorkLink: Anderson, Oconee, and Pickens Counties of South Carolina

Upper Savannah: Abbeville, Edgefield, Greenwood, Laurens, McCormick, Newberry and Saluda Counties of South Carolina.

Proposed Sub-award Amounts: It is anticipated that the winning proposal(s) will be funded as two WIOA Title I subawards, each managed by the respective WDB. Both local areas are interested in cost sharing resources where practical. Anticipated funding for this program is authorized under the WIOA and is made available through the Department of Labor and the South Carolina Department of Employment and Workforce (DEW).

Anticipated funding for this program is authorized under the WIOA and is made available through the Department of Labor and the South Carolina Department of Employment and Workforce (DEW). The planning amount for services delivered under this RFP in the initial year of performance for the **WorkLink area is \$250,000 and \$400,000 for the Upper Savannah area (and an additional \$150,000 in youth funding.)** All is 100% is federal funding.

Type of Subaward: Cost reimbursement subaward

Anticipated Subaward Start Date: WorkLink: July 1, 2023, Upper Savannah: April 1, 2023

Initial Subaward End Date: June 30, 2024

The program must satisfy the program design, program elements, program performance and fiscal requirements found in the WIOA, the WIOA rules and regulations and all other applicable local, state, and federal rules and regulations. The goal for the use of these funds is to provide workforce development activities that increase the employment, retention, and earnings of participants, and increase attainment of recognized post-secondary credentials by participants, and as a result, improve the quality of the workforce, reduce welfare and dependency, increase economic self-sufficiency, meet the skill requirements of employers, and enhance the productivity and competitiveness of our local economy.

Actual awards and amounts are subject to the availability and appropriation of the WIOA funds. The initial period of performance under this award will commence: April 1, 2023 (Upper Savannah) and July 1, 2023 (WorkLink), and end June 30, 2024, subject to the availability and appropriation of funds. The WorkLink WDB and the Upper Savannah WFD reserves the option to extend or renew this award for Program Year 2024 (July 1, 2024-June 30, 2025), Program

Year 2025 (July 1, 2025-June 30, 2026), and Program Year 2026 (July 1, 2026 – June 30, 2027). Upper Savannah is negotiating end of contracts with prior provider. The start date may vary from April 1, 2023 if it is in the best interest of all parties. Upper Savannah will accept a start date of July 2, 2023. Total funding for Upper Savannah will be adjusted to the length of the award.

WorkLink WDB and Upper Savannah WRB reserve the right to increase or decrease the total subaward amount; the estimated amount listed in this RFP is provided solely as guidance to bidders in preparing their proposal budget. Bidders are not required to request the full amount of estimated funding available. Upper Savannah may make a start-up period available to a new provider starting at contract execution before the transition date. The WorkLink WDB may also make a start-up period available to a new provider, not to begin earlier than June 1, 2023.

It is WorkLink and Upper Savannah Workforce Development Board's intent to select a service provider(s) to serve both areas. The selected provider(s) will be awarded two grants (one from each Board). However, both Boards reserve the right to select the service provider(s) with the best proposal for their area, even if they are not the same service provider(s). If this occurs, the selected bidders will be able to negotiate with the appropriate Workforce Development Board to ensure that necessary funding is made available to accomplish the vision set forth in their proposal.

Any significant changes made to this request for proposals will be posted to the following website:
<http://www.worklinkweb.com/welcome/request-for-proposals/>.

B. WIOA Guiding Principles

The Workforce Innovation and Opportunity Act (WIOA) is based on several guiding principles to be adopted by state and local workforce development systems:

1. Increase access to education, training, and employment—particularly for people with barriers to employment.
2. Create comprehensive, high-quality workforce development system by aligning workforce investment, education, and economic development.
3. Improve the quality and labor market relevance of workforce investment, education, and economic development efforts.
4. Promote improvement in the structure of and delivery of services.
5. Increase the prosperity of workers and employers.
6. Improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet the skill requirements of employers, and enhance the productivity and competitiveness of the nation.

C. Overview of the WorkLink WDB

The Workforce Development Board (WDB) develops the link between employers and employees in *Anderson, Oconee, and Pickens counties*. Our volunteer board of directors ensures that the local workforce development system is market-driven and responsible in meeting the employment and training needs of businesses and job seekers. The board implements the "Workforce Innovation and Opportunity Act of 2014" in partnership with local service providers

and through a comprehensive SC Works System that provides locations for job seekers and employers to access employment and training services.

Our goal is to have a fully employed, skilled workforce, and to that end, we help job seekers find the tools to *build their careers*, and we work with businesses to hire quality employees. WorkLink funds programs for adults, dislocated workers, youth, and supports employers through On-the-Job and Incumbent Worker Training programs.

Vision Statement – To have a fully employed and highly skilled workforce in South Carolina.

Mission Statement – WorkLink develops the link between employers / businesses, and the workforce.

Core Purpose – We strive to improve the workforce and the quality of life in Anderson, Oconee, and Pickens Counties by being the vehicle for workforce development in Anderson, Oconee, and Pickens, South Carolina.

Administrative Entity

The South Carolina Appalachian Council of Governments (ACOG) is WorkLink's Administrative Entity and Fiscal Agent. All grants and contracts are entered into with the ACOG on behalf of the WorkLink WDB. If any changes occur with WorkLink's administrative entity, a new contract will be executed with the service provider for the remaining timeframe outlined in this proposal.

D. Overview of the Upper Savannah WDB

The Upper Savannah Workforce Development Board is focused on building a pipeline of skilled workers to meet employer needs. It communicates needs to K-12 and higher education providers. It has extensive connections to economic development and the business community.

Administrative Entity

Upper Savannah Council of Governments (USCOG) is the Upper Savannah WDB's Administrative Entity and Fiscal Agent. All grants and contracts are entered into with the USCOG on behalf of the Upper Savannah WDB. If any changes occur with Upper Savannah's administrative entity, a new contract will be executed with the service provider for the remaining timeframe outlined in this proposal.

Note Regarding Upper Savannah's commitment to joint procurement. It is understood that for a provider to effectively serve two areas efficiently both areas have to have similar policies and procedures. The Upper Savannah WDB will maintain policies originally set by the board until they can be reviewed. Policies, procedures and practices developed by staff will be modified to mirror WorkLink to the greatest extent possible.

Workforce Landscape

For labor market information for the Upper Savannah and WorkLink areas, please visit the Labor Market Info section of the SC Works Online Services website: <https://jobs.scworks.org/vosnet/Default.aspx>. The local area of Upper Savannah consists of Abbeville, Edgefield, Greenwood, Laurens, McCormick, Newberry and Saluda Counties of South Carolina. The WorkLink local area consists of Anderson, Oconee, and Pickens Counties of South Carolina.

An Overview of the SC Works System

The SC Works Center (also known as a One-Stop) system brings together a wide variety of Federal, State, and local program partners, integrates the provision of their services and provides a full-range of help to job seekers and employers, all under one roof. Services are driven by business and focus on customer choice.

The WorkLink Region has designated SC Works Centers currently located at:

Comprehensive Center	SC Works Clemson at East Park 1376 Tiger Blvd. Suite 102 Clemson, SC 29631 Hours: 8:30 – 5:00 M thru F Phone: (864) 643-0071 (TTY 711)
Satellites	SC Works Anderson 1428 Pearman Dairy Rd Anderson, SC 29624 Hours: 8:30 – 5:00 M thru F, closed for lunch 12p-1p (864) 260-6780 (TTY 711)
	SC Works Easley Pickens County QuickJobs Development Center Next to the Tri-County Technical College Easley Campus 1774 Powdersville Rd. Easley, SC 29642 Hours: 8:30 – 5:00 M thru Tu, closed for lunch 12p-1p Phone: (864) 220-8990 (TTY 711)
	SC Works Seneca Oconee County QuickJobs Development Center Next to the Hamilton Career Center 104 Vocational Drive, Seneca, SC 29672 Hours: 8:30 – 5:00 M thru F, closed for lunch 1p-2p Phone: (864) 646-1741 (TTY 711)
Access Points	Anderson Interfaith Ministries United Ways of Anderson County, Pickens County, and Oconee County Anderson, Oconee, and Pickens County Library Systems The Dream Center of Pickens SHARE

*WorkLink and Upper Savannah SC Works Center Hours of Operation are set by the WorkLink and Upper Savannah WDB and are subject to change.

WorkLink and Upper Savannah SC Works Centers follow the State Holiday schedule for office closings. WorkLink and Upper Savannah also periodically closes early for staff training.

For emergencies, such as inclement weather, WorkLink and Upper Savannah SC Works Centers follow the County government offices in which the SC Works Center is located for closings and/or delays.

The Upper Savannah Area has designated SC Works Centers;

Note: Locations, days of operation and hours may change. It is expected that WIOA career services staff be present at the Comprehensive five days a week, at Laurens and Newberry at least two. The

remaining counties should be supported at least once a week. The board may approve a virtual strategy to limit visits to outlying counties to days when there are scheduled appointments.

Comprehensive Center	<p>SC Works Greenwood</p> <p>Located in the Brewer Community Complex</p> <p>927 E. Cambridge Ave. Greenwood SC 29646</p> <p>Phone: (864) 229-8872</p> <p>Hours: Monday-Friday (8:30am-5:00pm)</p> <p>Closed from 12:00pm-1:00pm daily</p>
Satellites	<p>SC Works Abbeville</p> <p>Located inside Abbeville Administrative Complex</p> <p>903 W. Greenwood St. Abbeville, SC 29620</p> <p>Phone: (864) 366-6690 ext. 2291</p> <p>Hours: Tuesdays (9:00am-4:00pm)</p> <p>Closed from 12:00pm-1:00pm</p>
	<p>SC Works Edgefield</p> <p>Located at the rear of Edgefield Co. Health Department</p> <p>21 Star Road Edgefield, SC 29824</p> <p>Phone: (803) 636-5509</p> <p>Hours: Tuesdays (9:00am-4:00pm)</p> <p>Closed from 12:00pm-1:00pm</p>
	<p>SC Works Laurens</p> <p>Located beside Laurens Middle School</p> <p>1029 W. Main Street Laurens, SC 29325</p> <p>Phone: (864) 681-1605</p> <p>Hours: Monday-Thursday (9:00am-5:00pm)</p> <p>Closed from 12:00pm-1:00pm daily</p>
	<p>SC Works McCormick</p> <p>Located next door to Town Hall</p> <p>109 W. Augusta St. McCormick, SC 29835</p> <p>Phone: (864) 852-3649</p> <p>Hours: Mondays (9:00am-4:00pm)</p> <p>Closed from 12:00pm-1:00pm</p>
	<p>SC Works Newberry</p> <p>Located beside Piedmont Technical College- Newberry Campus</p> <p>1840 Wilson Road Newberry, SC 29108</p> <p>Phone: (803) 276-2110</p> <p>Hours: Monday-Thursday (9:00am-5:00pm)</p>

	Closed from 12:00pm-1:30pm daily
	SC Works Saluda Located across from Saluda Elementary 407 W. Butler Ave. Saluda, SC 29138 Phone: (864) 445-2047 Hours: Thursdays (9:00am-4:00pm) Closed from 12:00pm-1:00pm

LWIOA PY2022 Performance Goals

Each local workforce board is responsible for negotiating these measures with the State. The performance measures listed below are provided as information and as a baseline for the purpose of this request for proposals.

	WorkLink		Upper Savannah		
PY22	Adult	Dislocated Worker	Adult	Dislocated Worker	Youth
Employment 2 nd Qtr after Exit	81.1	83.3	77.8	80.1	73.2 Measure includes school participation
Employment 4 th Qtr after Exit	81.8	83.4	77.4	84.5	75.6 Measure includes school participation
Median Earnings 2 nd Quarter after Exit	\$6,200	\$7,935	\$5,800	\$7,995	\$3,622
Credential Attainment within 4 Qtrs after Exit	73.8	67.1	66%	63.1%	72.1%
Measurable Skills Gains	55.2	60.2	55.2%	57.1%	52.8%

*These levels are subject to change each program year.

South Carolina has chosen for the Employer Services performance measures:

- **Employer Penetration Rate**—the percentages of employer establishments using services out of all employer establishments in the state
- **Repeat Business Customers Rate**—the percentage of employer establishments using services during the year that also used services within the previous three years

PART 2: SOLICITATION INFORMATION

A. WorkLink Procurement

WorkLink and Upper Savannah reserve the right to cancel this solicitation in whole or in part and may reject any or all proposals in whole or in part. WorkLink WDB will notify all bidders in writing of the final status of this RFP.

RFP Release Date: November 21, 2022

WorkLink and Upper Savannah reserves the right to revise any part of the RFP at any time before the submission deadline date, if necessary. These revisions will become addendums to the RFP and will be posted on the WorkLink website: <https://worklinkweb.com/en/about-worklink/request-for-proposals/>

Bidders are responsible for checking the website frequently to remain informed about the procurement process. Bidders must amend proposal packages as addendums make necessary. Failure to acknowledge any addendum that impacts proposal requirements will result in disqualification of the proposal. WorkLink WDB reserves the right to revise any part of the RFP at any time, if necessary.

Contact Information

During the proposal and evaluation process, the sole contact point for any inquiries or information relating to this RFP will be:

Jennifer Kelly, Assistant Director
WorkLink Workforce Development Board
jkelly@worklinkweb.com

B. Solicitation Timeline

Event	Date	Time (EST)
Request for Proposal (RFP) Release	November 21, 2022	
Deadline to submit Technical RFP Questions*	December 13, 2022	5:00PM
Bidder's Conference	December 15, 2022	9:00AM
<i>Questions posted on WorkLink WDB website within 48 hours</i>		
Proposal Packages Due & Technical Review (Or Letter of Non-Reply due to WorkLink WDB)	January 9, 2023	1:00PM
Formal Review of Proposal Packages	January 10, 2023 - January 26, 2023	
Bidders' Presentations to RFP Committee	January 26, 2023	9:00AM**
WorkLink WDB Votes to Approve Recommendation	February 1, 2023	
Upper Savannah Votes to Approve Recommendation	February 1, 2023	
Written Notification to Successful Bidders	February 2, 2023	
Contract Negotiations begin with each WDB	February 2, 2023	
Compliance Documents due and Contracts Issued	Prior to Grant Award Date	
Upper Savannah Contract begins (anticipated)	April 1, 2023	
WorkLink Contract Begins (anticipated)	July 1, 2023	

*Any questions received after the deadline will be answered ad hoc and posted on the WorkLink website each week. No questions will be answered after January 2, 2023; final questions and answers will be posted no later than close of business on January 3, 2023.

**Times will be scheduled with each bidder by January 19, 2023. Presentations will only be scheduled if deemed necessary to adequately score proposals. Times available may vary throughout the day, the first presentation will begin at 9am.

C. Eligible Bidders

RFPs will be accepted from entities that can demonstrate the administrative and management capability to successfully provide the services identified in this RFP.

To be eligible to receive funds made available to operate a One Stop Center, a bidder must be an entity (public, private, or nonprofit) or a consortium of entities that, at a minimum, includes three or more of the required one-stop partners of demonstrated effectiveness, located in the Local Area. Entities selected and serving as one-stop operators are subrecipients of a federal award and thus are required to follow the Uniform Guidance. Such entities may include the following:

- Government agencies or governmental units, such as: Local or county governments, school districts, State agencies, and Federal WIOA partners;
- Employment Service State agencies under the Wagner-Peyser Act, as amended by title III of WIOA;
- Indian Tribes, tribal organizations, Alaska Native entities, Indian-controlled organizations serving Indians, or Native Hawaiian organizations (collectively referred to herein as “Indian Tribes”);
- Educational institutions, such as: institutions of higher education, nontraditional public secondary schools such as night schools, and area career and technical education schools (however, elementary and other secondary schools are not eligible to become a one-stop operator);
- Community-based organizations, nonprofit entities, or workforce intermediaries;
- Other interested organizations that are capable of carrying out the duties of the one-stop operator, such as a local chamber of commerce, other business organization, or labor organization;
- Private for-profit entities;
- Local WDBs, if approved by the Chief Elected Official (CEO) and the Governor as required in WIOA sec. 107(g)(2).

Additional Qualifications of Bidders:

1. Any not-for-profit entity **MUST** have been incorporated for at least two years (as evidenced by a letter from the appropriate governing body certifying incorporation) **AND** be designated as a 501 c-3 tax-exempt organization by the Internal Revenue Service.
2. Any for-profit entity must have been incorporated at least two (2) years, and applicants must provide an Original Certificate of Insurance by the time of the award announcement.
3. Organizations submitting proposals must have the ability to receive, disburse, and account for funds in accordance with generally accepted accounting practices; are licensed or otherwise authorized to do business in the state of South Carolina; demonstrate the ability to provide program services as specified in the RFP; are not debarred or suspended for participation in state or county contracts, fidelity bonded; and demonstrate the ability to comply with WIOA regulations.

4. The Bidder has successfully provided workforce development services for the past two years.
("Successfully" is defined for the purpose of this RFP as being able to demonstrate that the entity has maintained fiscal integrity; AND has operated a One Stop System/Center for more than two years OR can demonstrate successful performance in operating similar employment and training focused centers for more than two years; AND has direct experience providing WIOA services to businesses OR has experience providing similar types of services to businesses);
5. The Bidder understands and agrees as part of submission of their bid to meet the following conditions:
 - Discloses any potential conflicts of interest arising from the relationship of the Operator with particular partners or service providers;
 - Does not establish practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term services, such as intensive employment, training, and education services;
 - Complies with Federal regulations, and procurement policies, relating to the calculation and use of profits;
 - Has the ability to fulfill Contract requirements, including the indemnification and insurance requirements;
 - Has the ability to maintain adequate files and records and meet reporting requirements;
 - Has the administrative and fiscal capacity to provide and manage the proposed services and to ensure an adequate audit trail; and
 - Meets other presentation and participation requirements listed in this RFP.

Bidder's Conference

A Bidder's Conference will be held: **December 15, 2022, at 9:00am EST.**

All bidders are required to attend the Bidder's Conference via web conference.

Conference call login requests must be made via email to the contact listed in Section 2 of this RFP by the December 13, 2022, technical questions deadline. Bidders should reference the RFP number in the email subject line.

Technical Questions

All technical questions regarding this RFP should* be submitted no later than 5:00PM, December 13, 2022.

Email questions to the contact information listed in Section 2A of this RFP (hereafter RFP Point of Contact) and reference the RFP number in the email subject line.

*Questions received after the technical question's deadline will not be addressed in the Bidder's Conference; however, any questions that are sent after the technical questions' deadline until five days prior to the proposal submission deadline (January 2, 2023) will be answered and posted to the WorkLink website. It is the bidder's responsibility to check the WorkLink website regularly. Please note that any questions answered via telephone may be recorded for the processing of notes to post on the website.

D. RFP Response Due Date: January 9, 2023, 1:00PM (EST)

All proposals must be received by the due date and time. Proposals delivered in person will be timestamped by WorkLink staff. Proposals received after the due date and time specified will be disqualified from this RFP process and be returned unopened to the sender. The RFP and related documents can be downloaded from the WorkLink website at: <http://www.worklinkweb.com/welcome/request-for-proposals/>.

E. Technical Review

This RFP identifies all relevant requirements, technical review process, evaluation factors, scoring point range, and selection process. **A Technical Review will be completed for all proposals received by January 9, 2023 1:00 pm EST.** Proposers that fail to meet the proposal submission guidelines will be disqualified from further consideration.

- Applications will be opened and a preliminary review for responsiveness will be conducted by the WorkLink and Upper Savannah Workforce Development Board staff.
- Bidders will be notified regarding non-responsive applications within 48 hours. Notification will be sent to the contact person listed on the cover sheet. A valid email address is required for this notification.
- Once an application has been deemed responsive by the preliminary review, applications will then be reviewed by an ad hoc RFP review committee of the WorkLink and Upper Savannah Workforce Development Boards and rated based on the criteria established in Evaluation Criteria and Rating System.

F. Presentations

Bidder's may be requested to make an oral presentation of their application to the RFP Review Committee after the Application opening. Such presentations provide an opportunity for the bidder to clarify their application and to ensure mutual understanding. The RFP Contact will schedule these presentations if required. January 26, 2023, has been reserved for this purpose.

PART 3: SCOPE OF SERVICES AND OPERATIONS

The Scope of Services required for this RFP encompasses the overarching role of One Stop Operator, but with two focuses: Jobseeker Services and Business Services. Dedicated resources should be directed to coordination of 1) job seeker services and SC Works center management and 2) services for businesses for the identified WDB areas.

Both focus areas should have specifically defined responsibilities but work in tandem with one another. There should be at least one identified dedicated Center Manager that will coordinate job seeker services throughout the community and manage Center operations, and at least one dedicated Business Services Representative to coordinate employer services.

A. SC Works Operator Role

For the purpose of this RFP, the One Stop Operator is not particular to one individual or job title, but to the organization(s) or group of organizations selected to operate the SC Works System for the WDB(s).

The scope of operations involves the delivery of the full array of Workforce Innovation and Opportunity Act (WIOA) services, including coordination of services provided by WIOA mandated and non-mandated partner organizations, to all interested job seekers and employers in the comprehensive SC Works Center, affiliated SC Works satellite sites, and Access Points as identified in WorkLink and/or Upper Savannah's Memorandum of Understandings and agreed upon by our local elected officials.

Primary Goals under this RFP:

- The Operator shall ensure that customers receive the highest level of service when engaged with SC Works Jobseeker Services.
- The Operator shall ensure that employers receive the highest level of service when engaged with the SC Works System and WIOA Business Service activities.
- The Operator shall ensure access to the labor market data, information and analysis, job search access, placement, recruitment, and other labor exchange services authorized by Wagner-Peyser. Wagner-Peyser services are mandated to co-locate within the SC Works Centers.
- The Operator shall provide information and access to programs and activities carried out by SC Works partners as described in the Memorandum of Understandings between the WDBs and the local elected officials.
- The Operator shall ensure that SC Works partners, on an ongoing basis, deliver quality and timely career services in the SC Works Centers and business services in the community.
- The Operator shall ensure customer access to information regarding training services offered in the WorkLink region.
- The Operator shall ensure that all Center locations, services, and outreach materials are accurate, ADA, and EO compliant.

1. Partner Coordination

The selected bidder will coordinate, facilitate, promote, design, and expedite services for the WorkLink and/or Upper Savannah WDB's designated SC Works Centers and WIOA Business Services. The selected bidder will work in close partnership with the WorkLink and/or Upper Savannah WDB staff and partners to provide guidance and leadership to the SC Works system to achieve the following outcomes:

- Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families.
- Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers.
- Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
- Participate in rigorous evaluations that support continuous improvement of SC Works Centers by identifying which strategies work better for different populations and industries.
- Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

Both WDB in conjunction with DEW and the contracted OS Operator negotiate an MOU on an annual basis. This MOU details the locations of Centers, the partners' roles and financial responsibilities, and services to be delivered through the SC Works Centers in the WorkLink and Upper Savannah regions.

The SC Works Operator selected through this procurement will coordinate an integrated system of SC Works services offered by the required and additional SC Works Partners as described in these MOUs. The Operator will convene partners quarterly with the intention of streamlining and reducing duplication of services, providing excellent customer service, meeting performance measures, planning, sharing resources, tracking referrals, and budget planning among others. Partner coordination should be addressed for both job seekers and businesses and should be focused on the SC Works system versus the physical walls of the SC Works Center locations.

2. Oversight of the SC Works Centers

The selected Operator will coordinate, facilitate, promote, design, and expedite services for the WDBs designated SC Works Centers.

a. SC Works (One Stop) Certification Standards

WIOA requires that the State Workforce Development Board (SWDB) establish objective criteria and procedures for use by Local Workforce Development Boards (LWDBs) in assessing one-stop centers at least once every three years. The criteria must be used to evaluate the one-stop centers and one-stop delivery system for effectiveness, including customer satisfaction, physical and programmatic accessibility, and continuous improvement.

The SC Works Operator shall achieve the major work components and standards necessary to acquire and maintain One Stop Certification Standards. These standards are:

- One Stop Management Standards
- Systems Standards for Employer Services
- System Standards for Job Seeker Services

Under this component, the Operator is responsible ensuring system-wide standards are achieved and utilize continuous quality improvement assessment tools to document positive change and to systemize standards and their usage across the system.

b. SC Works Center Management

The selected bidder will provide functional management and oversight of the partnership of agencies that comprise the SC Works Center system. The Operator is responsible for implementing and managing the SC Works system under policies and guidelines established by both WDBs, the State Workforce Development Board, the offices of SCDEW, and the Federal government. The Operator serves as the functional leader of this team of partners as well as a facility manager for the SC Works Center sites, to include scheduling, communication, arranging of maintenance and upkeep, etc. The Operator will be required to appoint at least one Center Manager to operate the day-to-day operations of the Center and coordinate job seeker services in the community.

c. Services To Be Provided to Job Seekers

The One Stop Operator will ensure that Job seekers have appropriate access to career services as identified in sec. 134(c)(2) of WIOA at established WorkLink SC Works Center locations and during specified hours of

operation. The Operator will be required to set-up and maintain a resource room at each SC Works Comprehensive Center and Satellite site.

The Operator will coordinate services and develop strategies to improve and increase services to job seekers based on best practices, including but not limited to:

- Providing quality services to job seekers.
- Identifying and integrating job seeker services best practices into SC Works.
- Coordinating events based on local labor market needs and jobseeker and employer assessments.
- Participating in statewide planning activities related to job seekers.
- Coordinating and supporting partner's employment and training services efforts as it relates to the SC Works Centers.
- Providing access to services through the SC Works Centers and throughout the community, giving special attention to underserved populations and those with barriers to employment.
- Ensuring compliance with ADA and EO standards.
- Providing Orientations to SC Works Center services
- Coordinating Workshops related to job seekers, including financial literacy

d. Employer Service Coordination

Certain career services must be made available to local employers, specifically labor exchange activities and labor market information described in § 678.430(a)(4)(ii) and (a)(6). The One Stop Operator will be required to appoint at least one Business Service Representative to coordinate all employer services in the community and execute work-based learning opportunities on behalf of the WDBs.

The Operator will coordinate services and develop strategies to improve and increase services to employers based on best practices, including but not limited to:

- Analyzing business needs and implementing practices and solutions to meet those needs.
- Providing quality services to businesses.
- Identifying and integrating business services best practices into SC Works.
- Coordinating events such as job fairs, hiring events, and industry-based events.
- Evaluating and implementing business service strategies based on local labor market needs and employer assessments, including sector strategy partnership meetings, employer workshops, job fairs, and hiring events.
- Participating in statewide planning activities related to business services.
- Coordinating and supporting partner's business service efforts as it relates to the SC Works Center.
- Convening Business Service Teams quarterly.

e. Employer Services: WIOA-Funded Work-Based Learning Opportunities

The One Stop Operator will be responsible for coordinating work-based learning opportunities under the scope of this RFP. Allowable types of work-based learning opportunities for Adults/Dislocated Workers are as follows:

- Registered Apprenticeships (OJT portion)

- Pre-Apprenticeship Programs (OJT) portion
- Work Experiences and Internships (Paid or Unpaid)
- Transitional Jobs
- On-the-Job Training Coordination (OJT)
- Customized Training
- Incumbent Worker Training (Local Board funds only)
- The Upper Savannah WFB will utilize the operator for youth work-based learning as well to include the list above not including Incumbent Worker Training. (Additional information is in the Upper Savannah deliverables section.)

The One Stop Operator will be responsible for coordinating all WIOA funded business services with the Adult/Dislocated Worker program provider. Participants must be enrolled prior to placement in any WIOA funded program. It will be the responsibility of the One Stop Operator to implement all processes and procedures agreed upon by both parties in carrying out WIOA-Funded Work-Based Learning Opportunities, including supportive services and case management responsibilities. The One Stop Operator will ensure all employer service activities, back-up documentation (such as contracts and timesheets), associated budgets and case notes are entered into the SC Works Online System in a timely manner, and will coordinate with the Program Services contractor to ensure that participant information is updated appropriately.

f. Rapid Response Services

Rapid Response Services, as mandated by DOL, are services delivered to businesses and employees of companies that are experiencing downsizing through layoffs or closure and may have also been impacted by a Worker Adjustment & Retraining Notification (WARN) issued by the State. The Department of Employment and Workforce operates the Trade Adjustment Assistance program and coordinates the Rapid Response teams across the State of South Carolina. The Operator will be a proactive member of the Rapid Response team and coordinate appropriate services on behalf of the affected workers and employer.

g. Provide Workforce Services in the Community

In addition to the comprehensive SC Works Center and SC Works satellite sites, the Operator will establish, maintain, and coordinate services in the community.

In an effort to reach remote communities with high levels of poverty and to break down the walls of the SC Works System, the Operator will make such SC Works basic career services available to those communities as appropriate. The Operator is responsible for determining ways to serve under reached and low-income communities, including frequencies and services to be delivered. The Operator is encouraged to be innovative in its approach, including exploring technological methods of delivering service.

SC Works Access Points are permanent non-traditional SC Works access locations (such as a partner location that does not host a mandatory partner staff member but provides basic career services to the general public under the SC Works Center brand) should be evaluated annually and updated as needed.

h. Outreach

The selected Operator will develop an ongoing outreach plan, both for the general population and for priority populations as appropriate, that shall include attending and/or hosting community groups and events, development of brochures (in addition to, but not duplicative of WDB or State mandated brochures), PowerPoint presentations, community-based print and radio ads, and if appropriate, website information detailing business offerings and an overall strategy for announcing the resources of the SC Works System. Other innovative outreach ideas are encouraged within allowable cost guidelines.

3. Special Grants and Outside Sources of Funding

From time to time, WorkLink and/or Upper Savannah will pursue grants that it believes supports the mission and the vision of the WDB. In these instances, the successful bidder may be asked to collaborate with these grants as needed and as allowable by WIOA rules and regulations.

In the event that either of the WDBs receives funding from DOL or DEW for similar employment and training services described in this RFP, the selected proposer under this RFP will provide services for those grants as well. The WDB will negotiate budgets and service levels with the grantee based on funding from those sources. If it is in the best interest of the region, WorkLink and/or Upper Savannah WDBs reserve the right to seek other providers for services under this section.

B. WorkLink Deliverables

The Contractor will be required to provide the following deliverables:

1. Execute Memorandum of Understandings and Agreements with partners (in partnership with WorkLink) annually
2. Attain and maintain One Stop Certification for all Centers
3. Maintain SC Works Center facilities, arranging for vendors and contractors to complete necessary maintenance
4. Maintain (and expand if necessary) Access Points service locations
5. Develop and carryout One Stop Operations and Business Engagement Plans
6. At a minimum, meet all performance measures (WIOA measures, Business Plan, WDB goals, customer satisfaction, etc.)
7. Develop and coordinate communications regarding the SC Works Centers and local area Business Services among staff and partners
8. Coordinate and maintain Staff Development and Training plans for all SC Works Center staff, includes partners, addressing at a minimum, customer service expectations, partner services, labor market information, latest news regarding business services for the region, etc.
9. Arrange and coordinate services for low-income and underserved communities, and for layoffs and rapid response events
10. Coordinate all job seeker services in the SC Works Centers and in the community, and coordinate all business services in the local area
11. Achieve Work-Based Learning Opportunity goals, expending 30% or more in participant or employer related costs.
12. Convene partners and business service teams quarterly
13. Ongoing participation in workforce development related community events, including coordinating job fairs, hiring events, service fairs, workshops, etc.

14. Participate and lead sector partnerships and/or industry focus groups quarterly (regional and local)
15. Ongoing collaboration and information sharing with the WDB staff
16. Coordinate workshops, track attendance, and publish workshop schedules monthly
17. Coordinate partner coverage for resource rooms
18. Set and monitor customer service standards for the Centers
19. Develop and maintain Partner Resource Manual or equivalent for staff and partners
20. Monitor referrals between partners, ensuring they are updated regularly in SCWOS
21. Develop and execute Outreach plan for the SC Works Centers, inclusive of priority populations, and for Business Services
22. Attend Board meetings and committee meetings prepared to present results or progress of goals identified in RFP response
23. Develop a report and/or dashboard of RFP deliverables and goals outlined in the RFP response to present at Board and Committee meetings
24. Expend a minimum of 95% of total grant
25. Other goals that support the Scope of Work outlined in this RFP

Reports

Monthly and Quarterly Reports: Routine monthly and quarterly written programmatic reports shall be due by the tenth (10th) calendar day of the month following the month being reported on.

The Operator will be required to develop a report and/or dashboard of RFP deliverables and goals outlined in the RFP response to present at Board and Committee meetings. WorkLink also requires the selected bidder to report center traffic numbers (daily, monthly, and PY to date cumulatively broken down by location), workshops offered (type and frequency), workshop attendees, Hiring Events, Job Fairs, referrals, business services and partner meeting minutes and activities, community events attended, progress on outreach plans, and similar activities. A sample report/dashboard should be submitted with the proposal package.

Financial Reports: Selected bidders will be required to submit accurate, current, and complete disclosure of the financial results of the WIOA contract/grant activities in accordance with SCDEW grant reporting requirements monthly. The selected bidder must report all allowable costs and activities, must identify and maintain in-house methodology for Individual Fund Tracking (IFT) for obligations, expenditures, and Individual Training Accounts (ITA) for participants. This information and reports must be available upon request by DOL, SCDEW, or WDB staff.

Financial reports will be prepared and submitted to the WDB office by the 10th day of the following month. Financial Reports include:

- Monthly Request for Payment
- FSR-S form
- General Ledger Detail
- YTD Expenditure Reports
- Contract Obligations by Fund Stream

C. Upper Savannah Deliverables

Upper Savannah deliverables are the same as Worklink with the following exceptions:

“5” The business engagement plans for Upper Savannah will be developed by the Upper Savannah Business Services Lead who is on the Upper Savannah staff.

“24” Expend a minimum of 90% of the total grant.

Note: Upper Savannah has a national dislocated worker grant which finishes August 18, 2023 but which has the possibility of being extended a year. Upper Savannah may offer the operator an opportunity to serve 35 dislocated workers or long-term unemployed participants in OJT for a cost not to exceed \$350,000. The budget will be negotiated if it is mutually acceptable based on the salary, and overhead rates set in this procurement.

Upper Savannah Reports

Upper Savannah reports are the same as WorkLink except. Financial reports are due the eight (8th) calendar day after the month following the month being reported on in order to ensure prompt payment.

The Upper Savannah Workforce Development Board would like the dashboard to include: number of resumes added or modified by month (total including self-serve and staff assisted,) number of soft skills activities provided (including all programs tracked by SC Virtual One-Stop,) number of Labor Market Information consultations (including all programs tracked by SC Virtual One-Stop,) and number of partner referrals made. The data is for benchmarking and does not need disaggregating by center.

D. Reference Documents

Bidders are encouraged to review relevant documents when constructing their responses to this RFP. Although not comprehensive, a list of resources has been made available below. Bidders are encouraged to conduct other research on the suggested webpages as well.

- PY2022 Regional and WorkLink Local Plans: <https://worklinkweb.com/en/publications/>
- PY2022 WorkLink MOU: <https://worklinkweb.com/en/publications/partner-meetings-and-information/>
- State Instruction Letters: <https://scworks.org/workforce-system/policies-and-guidance>
 - 11-11, change 1 “SC Works Center Leadership Team Roles and Responsibilities”
 - 16-12, “Facility and Program Accessibility Under WIOA”
 - 19-03, “SC Works Centers and the One Stop Delivery System”
 - 20-14, “Required Use of SCWOS for Referrals”
 - 21-04, “Required Use of SCWOS Greeter in SC Works Centers”
 - 21-06, “SC Works Certification Standards”
- State Guidance Documents: <https://scworks.org/workforce-system/document-directory>
 - South Carolina's Workforce Innovation and Opportunity Act State Plan
 - ES Manual Revision 1 - January 2018
 - ES Manual Revision 2 - August 2019

- Rapid Response Manual
- ADA Checklist for Existing Facilities
- Disability Access Checklist
- Labor Market Information – SC Works Online Services
 - Community Profiles: <https://lmi.dew.sc.gov/lmi%20site/CommunityProfiles.html>
 - Publications and Reports: <https://scworks.org/labor-market-information/publications-and-reports>
- SC Works Online Services (SCWOS) – labor exchange and case management system for WIOA and TAA – <https://jobs.scworks.org>
- TEGLs issued by US DOL - <https://www.dol.gov/agencies/eta/performance/tegl>
 - TEGL 04-15: Vision for the One-Stop Delivery System under WIOA
 - TEGL 08-15: Operating Guidance for WIOA
 - TEGL 10-16 Change 1: Performance Accountability
 - TEGL 15-16: Selection of One-Stop Operators Selection of One-Stop Operators
 - TEGL 16-16: One-Stop Operator Guidance for American Job Center Network One-Stop Operator Guidance for American Job Center Network
 - TEGL 19-14: Vision for the Workforce System and Initial Implementation of WIOA Vision for the Workforce System and Initial Implementation of WIOA
 - WIOA Desk Reference: [Work-Based Learning Overview](#)
- Definition of Terms – reference Section 1(b)3 of the Workforce and Innovation Opportunity Act of 2014.

PART 4: PROPOSAL APPLICATION & SUBMISSION INSTRUCTIONS

A. Format for Application

Applications are to be prepared simply and, in a manner, designed to provide a straightforward presentation of the bidder's capability and intention to satisfy the requirements of this RFP. Therefore, the bidder's application must follow the RFP format as closely as practicable. Failure to provide all the information requested by the RFP may result in the application being deemed non-Responsive and thus eliminating it from funding consideration.

Proposal Format Requirements

- Font: 12-point, Arial
- Paper/Pages: 8 ½ x 11 inches; numbered; 1-inch margins
- Each proposal must include a table of contents with numbered pages
- Include the name of submitting organization at the top right corner of each page and reference the RFP # and title

B. Required Forms

The RFP and all RFP forms are posted at: <http://www.worklinkweb.com/welcome/request-for-proposals/>

The bidder should follow the Proposal Checklist to put the proposal together. Word and Excel versions of these forms are available and may be requested from the RFP point of contact.

- Proposal Checklist (Form A)
- Proposal Cover Sheet (Form B), with signatures

- Proposal Table of Contents and page numbers
- Program Narrative
- Memoranda of Agreements or Understandings with Partners
- Subcontractor Description
 - Attachments: MOA/contract with description of services and costs
- WorkLink Budget Forms (Form C)
 - Attachment: Budget narrative
- WorkLink Master Summary of Goals (Form D)
 - Attachment: Sample Board/Committee Report/Dashboard
- Upper Savannah Budget Forms (Form C)
 - Attachment: Budget narrative
- Upper Savannah Master Summary of Goals (Form D)
 - Attachment: Sample Board/Committee Report/Dashboard
- Past Performance (Form E)
 - Attachments: Performance Summaries, Monitoring Reports (& Replies), and Financial Audit
- Organization Reference Chart (Form F)
 - Attachments: three or more letters of support from partners and/or employers
- Conflict of Interest Form (Form G)
 - Attachment: Bidder's conflict of interest should be filled out, the Board member conflict of interest is for information only
- Proposal Rating Sheet (Form H)
- Compliance Documents (Form I)
 - Attachments: Complete forms and attach requested exhibits
- Other – For other attachments or exhibits not otherwise specified and is necessary for the best representation of your proposal, include them in this section.

Note: Failure to include all of the required components in the order of the proposal checklist will result in a reduced score or disqualification. WorkLink WDB will not advise a bidder (outside of preliminary review) that his/her proposal is incomplete prior to rating or disqualification.

Required Signature

The original application must be signed and dated by a representative of the entity authorized to commit to the provisions of the RFP. **Unsigned and undated Applications will be rejected as being non-responsive.**

C. No Request Proposal Reply

Any person or entity that receives release of notification of WorkLink RFP 22-WIOA-01, but elects not to submit an application, should send a letter stating their intent to not submit a proposal to the WorkLink Workforce Development Board by the cited deadline for receipt of applications on January 9, 2023. Individuals or entities who do not reply with either an application or "Letter of Non-Reply" to the Contract/Grant Application Request will be removed from the Bidder's List and must re-apply in writing to again be placed on the Bidders' List. A "Letter of Non-Reply" should include a request to remain on the Bidder's List or your agency will be removed.

RFP Release Date: November 21, 2022

D. Proposal Submission

To be considered, all proposals must be submitted in the manner set forth in this proposal. It is the Bidder's responsibility to ensure that its proposal arrives on or before the specified time.

All proposals and materials submitted become the property of WorkLink WDB. All proposals shall be submitted in the name of the entity with legal authority to execute the contract should it be awarded.

Submitting Confidential Information

Bidders should be aware that proposals are subject to the Freedom of Information Act (FOIA). If any proposal contains trade secrets or other information which is proprietary by law, the bidder must notify WorkLink WDB of its request to keep that information confidential.

- For every document the bidder submits in response to or with regard to this solicitation or request, the bidder must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that the bidder contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a)(1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410.
- For every document the bidder submits in response to or with regard to this solicitation or request, the bidder must separately mark with the words "TRADE SECRET" every page, or portion thereof, that the bidder contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act.
- For every document the bidder submits in response to or with regard to this solicitation or request, the bidder must separately mark with the word "PROTECTED" every page, or portion thereof, that the bidder contends is protected by Section 11-35-1810.

All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Do not mark your entire response (bid, proposal, quote, etc.) as confidential, trade secret, or protected. If your response, or any part thereof, is improperly marked as confidential or trade secret or protected, WorkLink may, in its sole discretion, determine it nonresponsive. If only portions of a page are subject to some protection, do not mark the entire page.

By submitting a response to this solicitation or request, the bidder (1) agrees to the public disclosure of every page of every document regarding this solicitation or request that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED", (2) agrees that any information not marked, as required by these bidding instructions, as a "Trade Secret" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise,

any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, are subject to public disclosure.

In determining whether to release documents, WorkLink will detrimentally rely on the bidder's marking of documents, as required by these bidding instructions, as being either "Confidential" or "Trade Secret" or "PROTECTED". By submitting a response, the bidder agrees to defend, indemnify and hold harmless the SC Appalachian Council of Governments, the WorkLink WDB, Upper Savannah Council of Governments, Upper Savannah WDB, the State of South Carolina, its agencies, and their officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from withholding information by the SC Appalachian Council of Governments, the WorkLink WDB, Upper Savannah Council of Governments, Upper Savannah WDB the State of South Carolina or any of their agencies, that the bidder marked as "confidential" or "trade secret" or "PROTECTED". (All references to S.C. Code of Laws.)

Submission requirements:

1. All bidders must submit a proposal original (not duplicated from other sources) and developed within the past forty-five (45) days.
2. Each bidder is to submit an electronic copy of the proposal.
 - The electronic copy must be identical to the original offer.
 - File format should be compatible with Microsoft Office (version 2010 or later), or Adobe Acrobat or equivalent Portable Document Format (.pdf) viewer.
 - The RFP Contact must be able to view, search, copy and print electronic documents without a password.
 - Also submit an electronic, redacted copy of the proposal if applicable

If your bid includes any information that you marked as "Confidential," "Trade Secret," or "Protected" in accordance with the section entitled "Submitting Confidential Information," you must also submit one complete electronic copy of your offer from which you have removed or concealed such information (the redacted copy). The redacted copy should (i) reflect the same pagination as the original, (ii) show the empty space from which information was redacted, and (iii) be submitted in a file format that is compatible with Microsoft Office (version 2010 or later), or Adobe Acrobat or equivalent Portable Document Format (.pdf) viewer. Except for the information removed or concealed, the redacted copy must be identical to your original offer, and the RFP contact must be able to view, search, copy and print the redacted without a password.

Document Naming Requirements

The final proposal document(s) should be named as follow: The Solicitation number and the name of the Organization. If the proposal package is to be submitted in parts, each resulting document must be

appropriately identified as to its relationship to the set, e.g., 1 of 2. (Example: "RFP 22 WIOA 01_ABC Co_pt 1 of 4")

For those also submitting a redacted copy, please clearly mark the redacted documents with either "R" or "Redacted." (Example: "RFP 22 WIOA 01_ABC Co_pt 1 of 4_redacted") **Note that redacted copies do not replace the original copy. If an original copy is not submitted, your response will be determined non-responsive.**

Bidders are to select one of the four options listed below to submit their electronic proposal:

Option A - Email submission (submit one copy of the original)

- The email subject line must be labelled in the following manner: Identifier and name of solicitation, "Final Proposal Submission", Name of Submitting Organization.
Example: 22-WIOA-01 One Stop Operator, Final Proposal Submission, ABC Co.
- If the final submission is to be submitted in multiple emails, please include the following in the email subject line: "Email # of # Emails."
Example: 22-WIOA-01 One Stop Operator, Final Proposal Submission, ABC, Co., Email 1 of 4 Emails.
- There are no requirements surrounding the body of the email.

Option B - WorkLink DropBox (submit one copy of the original)

- The proposer may submit through DropBox. Please email the RFP Point of Contact for directions on how to submit using this method.

Option C - Other arranged by Bidder (submit one copy of the original)

- The proposer may email the point of contact listed in Part Two of this solicitation to arrange for alternative methods for submitting the electronic copy. The proposer must make this method available through their own means. No electronic copies will be accepted from questionable file sharing transfer sites.

For those submitting their electronic copy using Option A, B, or C:

To ensure that your proposal package was received electronically, the bidder must send a separate email after submission confirming the proposal is ready for review. The bidder should include pertinent information regarding the submission, such as how to access the proposal and the number of documents that were submitted. (Example: "ABC, Co has uploaded four documents to the WorkLink Dropbox in response to solicitation 2022 WIOA 01. Please confirm receipt.")

WorkLink will reply with an email acknowledging receipt. It is the bidder's responsibility to begin submitting documents well in advance of the due date/time to prevent missing the deadline.

Option D - USB flash drives. (One electronic copy per hard copy proposal)

- Submit the number of copies indicated below in number 3 (should be the same as the number of hard copies, including one original.)
- Every USB drive must be labeled with the solicitation number and the offeror's name. If multiple USB drives are submitted, each USB drive in the set must be appropriately identified as to its relationship to the set, e.g., 1 of 2.
- For redacted copies, include either one separate USB flash drive labeled using the original naming convention with the word "Redacted" added to the label, or include with one full copy of the original proposal, one copy of the redacted documents (clearly labeled) on the USB flash drive.

Facsimile transmitted proposals will not be accepted.

The electronic copy must be submitted by the due date/time; **failure to do so will result in non-response**. For those submitting through file transfer, bidders are strongly encouraged to submit the electronic copy of the proposal early.

3. Each bidder is also to submit an original and eleven (11) copies of each application under seal. (Handwritten copies will not be accepted.)

The original of each application should have an original signature and be clearly marked "Original Copy" on the outside of the binder. All others should be clearly marked "Copy."

Each copy of the application should be bound in a single volume. All documentation submitted with the applications should be bound in that same single volume. The resulting format should be easy to use for reading and reviewing proposals. Acceptable binding methods include: three-ring binders, thermal binding, screw binding posts, comb binding, wire binding, coil binding, pressboard report cover with prong fasteners, or other similar types of bindings where all pages have more than one point where they are bound. Do not use: binder clips, staples, file folders, or binder rings as these are less sturdy.

If submitting an electronic copy via USB flash drive, include it with the hard copies, ensuring that it can be easily accessed but not easily separated from the single bound volume. (Examples: a resealable envelope attached to the bound volume; a clear pencil pouch included in the three-ring binder; or similar.)

4. The bidder is required to have typed or legibly written on the envelope or wrapping containing the proposals the RFP number, the RFP date (January 9, 2023), and the program and activity for which funding is being requested. Pages of proposals should be numbered.

SUBMIT TO: WorkLink Workforce Development Board
Attn: Jennifer Kelly, Assistant Director
1376 Tiger Blvd, Suite 102
Clemson, SC 29631
jkelly@worklinkweb.com

LABEL: Outside of sealed proposal package must be marked in accordance with this example:

ABC, Inc.
100 My Road
My Town, SC 29670
RFP #22-WIOA-01, January 9, 2023
One Stop Operator

DUE DATE: **January 9, 2023, 1:00PM (EST)**

This RFP does not commit WorkLink nor Upper Savannah WDB to pay any costs incurred in the preparation of a response to this proposal request, and the bidder agrees that all costs incurred in developing this proposal are the bidder's responsibility.

Reasons for Due Date extensions:

If an emergency or unanticipated event interrupts normal operation of the WorkLink WDB so that hard copies of proposals cannot be received at the office designated for receipt of bids by the exact time specified in the solicitation, the time specified for receipt of hard copies of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first workday on which normal government processes resume. In lieu of an automatic extension, an Amendment may be issued to reschedule bid opening. Helpful information may be found here: <https://www.scemd.org/closings/> (WorkLink follows Pickens County Government Office closings.)

If WorkLink WDB experiences an internet outage or other similar technology related issue so that electronic copies of proposals cannot be received by the exact time specified in the solicitation, the time specified for receipt of electronic copies of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first workday in which WorkLink WDB has restored internet or technological functionality and allows normal government processes to resume. In lieu of an automatic extension, an Amendment may be issued to reschedule bid opening.

If WorkLink or Upper Savannah WDB is closed due to emergency or if WorkLink or Upper Savannah WDB experiences an internet outage or other similar technology related issue at the time a pre-bid or pre-proposal conference is scheduled, an Amendment will be issued to reschedule the conference.

PART 5: PROPOSAL NARRATIVE INSTRUCTIONS

Please format your narrative responses in the same order as the sections listed here.

I. Program Proposal Synopsis *(Limit to 1 page)*

- Provide a brief statement of what the proposer intends to accomplish as the Operator if awarded a contract and how it will specifically benefit the WorkLink and/or Upper Savannah region.
- Describe your organization's vision of the SC Works system (more than just the SC Works Centers) for the WorkLink and/or Upper Savannah region. Include target customers, key locations, and SMART goals. Address both focus areas: Center Management with Job Seekers Services and Business Services.
- Describe why your organization should be chosen to deliver services in the WorkLink and/or Upper Savannah region.

II. Experience, Capacity & Past Performance

A. Experience

- Briefly describe your organization. Include the size of the proposing organization (total number of employees); number of years in operation; a description of current employment and training programs you are currently administering (or if no current active programs, those your organization has operated within the last two years), and where those programs are geographically located, and denoting whether they are federally funded.
- Describe the resources and expertise your organization has in operating a federally funded workforce development system of comparable size and scope. Include technological, management, administrative, and staff capabilities, and direct or related experience providing daily and long-term strategic oversight of fiscal, facilities, personnel, and service delivery components of a multi-partner workforce project.
- Give a brief summary of a similar project that you have implemented along with benchmarks that you have achieved. Include examples of established employer and partner relationships. Describe your experience managing an American Job Center (or equivalent) and delivering job seeker services. Provide at least three contacts for similar projects that the evaluation committee may contact for references (Form F, Organization References) and attach three letters of support from pivotal partners and/or employers.
- Describe the process you followed to integrate and coordinate services with mandated WIOA partners and non-WIOA service agencies. Describe any non-WIOA partner programs and give the reason they were chosen to integrate. If the bidder has not been a One Stop Operator previously, the experience described should be for a similar project.
- Describe your experience in managing and accounting for multiple federal, state, and local funding sources in accordance with Generally Accepted Accounting Principles (GAAP) and how you conduct self-monitoring for contract performance and compliance on these projects. Provide a summary of federal dollars that your organization is currently managing.

B. Financial and Administrative Capacity

Provide a brief description of the fiscal and administrative team and how they will support the WorkLink and/or Upper Savannah region, including an overview of how local program management/frontline staff will be involved in the fiscal processes, including budgeting and tracking obligations, accruals, and expenditures.

Describe in detail the applicant's financial management system, demonstrating the organization's ability in each of the following areas:

1. *Effective control and accountability over workforce development assets* (funds, property, other workforce development assets) –Describe how the financial system that is in place will maintain effective control and accountability over all funds, property and other workforce development assets including the adequate safeguard of such assets.
 - Describe internal controls that have been put into place to safeguard against fraud and mismanagement of funds.
 - Describe any programmatic and/or fiscal monitoring findings. Provide a Certified Audit Financial Statement. The Audit statement must be based on a fiscal period not more than eighteen (18) months old at the time of submission, certified by an independent certified public accountant. Please share if the audit contains any exceptions or recommendations.
 - Describe how you track property, including any property handbooks or policies that have been developed. Provide a copy of your procurement policy that would apply to a federally funded grant.
 - Describe the Proposer's ability and method it would use to repay disallowed costs if such disallowances are identified in the monitoring or audit of the contract.
 - WIOA funds are distributed through a process of drawdowns from DOL and then from the State to the WDB's Administrative Entity then to the successful bidder. This process may be lengthy. Describe the organization's ability to fiscally cover the time between expense and payment (typically 20 to 30 days).
2. *System's capability of generating financial information* – Describe the system's reporting capabilities (including fiscal staff's knowledge and experience as well as the financial system that will be used) as it relates to generating all financial information needed for submitting invoices and required reports, including data needed to monitor and evaluate, and if necessary, modify program performance.

Applicants must operate a system that satisfactorily accounts for and documents the receipt and disbursement of all workforce development funds. While a separate accounting system is not required, each selected provider must maintain financial records that adequately identify the source and application of all workforce development funds.

3. *Source documentation* – Describe the bidder's process for ensuring that accounting records are supported by source documentation for each transaction, detailing how you ensure that records are traceable to documentation and maintained in such a manner as to provide a complete and accurate audit trail during any internal or external examination.

4. *Administrative Role*

- Describe the process used to track staff time spent on this project if awarded, including a description of software that may be used to track their time. Provide a copy of your holiday schedule.
- If staff will be eligible for raises or bonuses during the contract period, describe how this is determined, and how it's implemented.
- Describe in detail benefit packages that will be made available to employees, and when they will be eligible to receive those benefits.
- Provide an organizational chart inclusive of all executive staff to frontline staff.
- Describe how you will internally monitor procedures to ensure that program operations are conducted in compliance with the WIOA Final Rules and Regulations, and any contractual/grant agreement resulting from this Request for Proposal, both programmatically and financially.

5. *Internal Monitoring/Technical Assistance*

- Describe how you will internally monitor program design, policy, and procedures, and provide technical assistance to staff to ensure that program operations are conducted in compliance with the WIOA Final Rules and Regulations, WIOA performance measures, and any contractual/grant agreement resulting from this Request for Proposal, both programmatically and financially. Include how often monitoring will occur and whether there will be formal or informal written reports. Include how you will monitor ADA compliance and anti-discrimination in service delivery. This should be addressed both from the upper program management/support level as well as on the local level. Include how you will pursue innovation and best practices and denote any point person that will be responsible for leading this effort.

C. *Staffing Plans*

- Using the Staff Allocation Plan in the Budget Template, provide a staffing plan for the WorkLink and Upper Savannah regions. Clearly denote staff that will be shared between WorkLink and Upper Savannah, and staff that will be fully dedicated to each region. Include a percentage of each person's time for WorkLink, Upper Savannah, and other projects. (All staff should match the Staff Allocation Plan as presented in the Budget Template.) Include all staff that will be fully or partially funded under this project. Denote supervisory roles and show indirect support from fiscal and administrative staff and how they fit into the staffing plan.
- Using your staffing chart, describe your staffing plan in detail. Include the following:
 - Provide the associated job description and title for each fully or partially funded position, including education and work experience requirements. Provide a copy of existing staff's resumes. For new providers, also include a description of your start up timeline and plans for hiring qualified candidates.
 - Provide the % of time each staff will spend on each region's project associated with this RFP, on other grants in each of these regions, as well as other outside activities.
 - Denote which positions will be in-person vs. remote, giving the % and unit of time the percentage is based on. (i.e., Accountant 100% remote all year. Program Manager 50% remote, 50% in-person per week.) These percentages should be based on the billable hours for WorkLink, and not total hours worked in a week.
 - Denote which positions will be co-located in an SC Works Center and those that will have alternate workspace locations.

- For co-location at one of the SC Works Centers, include each position, describing their workspace needs (permanent office, temporary private space such as a cubicle, etc.), the desired SC Works Center location(s) in which they will report, and % of time that they will report to each desired location.
- For those not reporting to an SC Works Centers, include each position, indicate if remote and/or provide the alternate location address(es) and the % of time remote/alternate location(s).
- Include copies of any telework or remote work policies that your organization has adopted. Describe which employees are eligible for telework or remote work, and the circumstances that they may be eligible for telework or remote work.
- Describe your staff development plans.

D. Past Performance

- Describe your past performance managing federally funded One-Stop Systems and providing work-based learning opportunities, or comparable experience. Complete Form E, Past Performance.
- Provide best practices, success stories, accomplishments, current projects or progress towards deliverables, and lessons learned from your experience managing similar projects. If you had findings or corrective actions, explain what they were and how they were corrected.
- Attach to Form E, Past Performance:
 - (1) A copy of the most recent WIOA annual performance summary or Rolling 4 Quarters Performance Summary, highlighting the region and/or fund stream that your project impacted.
 - (2) A recent monitoring report of a project similar in scope to this RFP.
Acceptable documents may be a summary or goals and outcomes presented to a board of directors (such as a report detailing progress towards specified deliverables) and/or a monitoring report issued by an independent organization (such as a local area monitoring report or a state monitoring report of WIOA activities in a local area). If a corrected action plan was required, attach the response to the monitor's request.
 - (3) Attach a copy of your most recent Financial Audit.

III. Program Design

Bidders are encouraged to use graphics and charts to accompany descriptions as it relates to relationships, processes, and locations.

In letters B – H of this section, the Bidder is to develop their response to address the following:

- A description of the Bidder's vision for the SC Works System in the WorkLink and/or Upper Savannah region.
- How their vision supports the Scope of Services described in Part 3 of this RFP as well as the deliverables described, WorkLink and/or Upper Savannah's Local Plan, One Stop Certification Standards, and/or Memorandum of Understandings.
- A solid, realistic plan to carry out this vision based on SMART goals. The specifics of each SMART goal should be included in response to each topic along with key objectives and timelines.
- Include how you will research and collect relevant data from a variety of sources to drive positive changes in the SC Works system in the WorkLink and/or Upper Savannah region.
- Include evidenced based best practices or innovations in your responses.

- Include how you will use technology to deliver services and coordinate partners.
- Include how you will share appropriate resources between WorkLink and Upper Savannah.

A. Start-Up Plan

For proposers not currently providing One Stop Operator services, describe your start-up plan and proposed transition period, including a timeline of events and staff training planned or anticipated.

For proposers currently providing One Stop Operator services, describe your start-up plan and proposed transition period for Business Services and WIOA-Funded Work-Based Learning Opportunities, including a timeline of events and staff training planned or anticipated.

B. Service Delivery & Partner Coordination

The One Stop Operator must coordinate the service delivery of required one-stop partners and service providers throughout the service delivery area.

- Describe your plan for service delivery coordination throughout the service delivery area. Be specific, identifying staff roles and responsibilities listed in your budget, key partnerships and what their role might be in the delivery of services, and key customers and service delivery strategies.
- Describe how you will bring partners together to coordinate service delivery with the goal of reducing duplication of services and providing quality services to employers and jobseekers, include your philosophy on how you plan to manage partners. If applicable, include descriptions of functional teams or business account management systems that you may establish.
- WorkLink and/or Upper Savannah requires the One Stop Operator to convene partner groups and business services teams quarterly. Describe your vision for the quality and content of these meetings, including how you will use various data to drive decision-making and goal setting.
- Describe how you will collect and disseminate partner information to frontline staff, including how you will implement and track referrals between partners and train staff on partner services.
- Describe how you will manage partner conflicts when they arise.
- Attach at least three letters of support from pivotal partners and/or employers to Form F – Organizational References.

C. Individuals Requiring Long Term Services

WIOA prohibits the establishment of practices that create disincentives to providing services to individuals with barriers who may require long term services. How will you ensure that these types of practices are not established among partners and programs throughout the service delivery area? Be specific, addressing accessibility as it relates to ADA, anti-discrimination as it relates to EO, and outreach and tailoring of services for priority populations.

D. SC Works Center Management

Each service delivery area must have at least one comprehensive one-stop center. The One Stop Operator is responsible for operating the center and coordinating service providers within the center. In addition to the

Comprehensive Center, WorkLink and/or Upper Savannah has designated satellite sites and access points throughout the region.

- Describe your plan for operating these locations. Be as thorough as possible in sharing your vision of the Center structure and specifically the resource rooms.
- Address roles and responsibilities of the Operator, the management and partner staff; organization of frontline staff; customer service standards; coordination of services; establishing processes and procedures; and the flow of communication. Include other relevant topics as needed.
- Describe how the One Stop Operator will bring this vision into practice.
- Address how you will ensure that dedicated resources are attributed to Center Management with Job Seeker Services and attributed to Business Services.

E. Business Services

Describe how your program design includes the required business services found in WIOA 134(c)(1)(iv), WIOA 134(c)(1)(v) and Regulation 678.435. Be specific in sharing your vision of how Business Services will be carried out in a way that meets employers and job seekers needs. Do not only respond to these prompts but provide as complete of a picture as possible.

- Describe how the One Stop Operator will bring this vision into practice. Include how you will incorporate labor market research, employer feedback, and sector strategies into your delivery model.
- Describe how you will be involved in hiring events and job fairs. Describe how you will convene sector partnerships and industry groups.
- Describe how you will communicate with SC Works Center staff and the Business Service Integration Team regarding employer needs.
- Describe how you will collect and track customer satisfaction surveys to businesses utilizing SC Works Center services and implement solutions to address deficiencies.

F. Career Services

Describe how your program design includes the required career services found in WIOA 134(c)(2). Be as thorough as possible in sharing your vision of how Career services will be made available throughout the SC Works Centers and in the community. Describe how your vision will meet the needs of employers and job seekers. Do not only respond to these prompts but provide as complete of a picture as possible.

- Describe how the One Stop Operator will bring this vision into practice. Include how you will incorporate career pathways, sector strategies, employer and job seeker feedback, and labor market research into your delivery model. Include strategies on how you will deliver career and business services based on customer focus.
- Describe your approach to addressing soft skills and how you will make those available in the SC Works Centers and in the community.
- Describe the services you will provide during layoffs and Rapid response events.
- Describe how your program design includes the required training services found in WIOA 134(c)(3)(D). Be specific, addressing how you will encourage life-long learning, make financial aid information available, and information about partner programs and programs of study available through adult education and institutions of higher learning in the WorkLink and/or Upper Savannah region.

G. WIOA Funded Work-Based Learning Opportunities

Describe how you will design your WIOA funded business services to meet WorkLink and/or Upper Savannah's business needs. Include your vision of how you will integrate the business solutions into your menu of business services and why these WIOA funded WBL opportunities are vital to your Business Services program. Do not only respond to these prompts but provide as complete of a picture as possible.

- Describe which WIOA funded business services you intend to make available in coordination with the WIOA Adult/DW program provider.
- Describe what sub-tier agreements you would put in place to support WIOA Funded Work-Based Learning Opportunities.
- Describe your placement goals and provide a breakdown of anticipated successful vs. unsuccessful completions. Include a cost per participant analysis.
- Describe your implementation plan for offering WIOA funded business services, including coordination with the Adult/DW program to enroll, case manage, and issue supportive services.
- Describe how you will track obligations and payments.
- Describe how you will address soft skills and basic skills, prior to and during placement on a WBL opportunity.
- Describe how you will evaluate the effectiveness of the WBL opportunity (from the participant and from the employers' perspectives) throughout the WBL opportunity.
- Describe your process for evaluating safety protocols on a worksite.
- Describe what efforts will be made to promote WIOA funded business services.
- Provide a SWOT analysis of your program design for work-based learning opportunities and address how you will overcome and address potential threats and weaknesses.

H. Provide Workforce Services in the Community

Describe how you will provide workforce services in the community. Include your vision of how you will break down the walls of the SC Works Centers and services and reach underserved, priority populations, and remote areas of the WorkLink and/or Upper Savannah region. Identify key partnerships and leveraged resources that will be incorporated into your program design. Do not only respond to these prompts but provide as complete of a picture as possible.

- Describe how you will identify opportunities for non-traditional service delivery and how you will "break down" the walls of the SC Works Centers and deliver services in the community, both for employers and job seekers.
- Describe how you will evaluate, maintain, and develop Access Points in the community.
- Describe the amount of time you plan to dedicate to coordinating and providing workforce services in the community.

I. Outreach Plan

- Describe how you will conduct outreach in the WorkLink and/or Upper Savannah area, promoting both employer and jobseeker services. Give a timeline and detailed explanation of what methods will be used and the perceived benefit of each outreach approach.
- Describe how the Proposer will ensure that target customer groups in local communities are aware of the SC Works and WIOA services. Describe how you will conduct outreach to hard-to-reach communities and to priority populations within the WorkLink and/or Upper Savannah region.

- Describe what relationships, partnerships, and community group organizations are essential to your outreach plan. Include planned presentations and print materials that will be needed to carry out your outreach plan.
- Describe what innovative outreach methods will be used in the community to promote awareness of SC Works Center services and WIOA Funded WBL opportunities.

J. Sub-Contracts

If the bidder is planning to sub-contract for any portion of the services described in this RFP, please include a detailed description of the Sub-Contractor, services to be delivered, implementation dates, and expected outcomes. Please note that sub-contracts must be approved by the WorkLink and/or Upper Savannah WDBs prior to implementation.

PART 6: BUDGET & BUDGET NARRATIVE INSTRUCTIONS

A. Budget

All bidders must complete and include two Budget Forms (Form C Budget Template) in their final submission, one for WorkLink region expenses and one for Upper Savannah region expenses.

For applicants submitting as a partnership or consortium with one agency serving as fiscal agent and partners serving as subcontractors, provide an additional Program Budget Sheet for each subcontractor. Provide a brief explanation of the subcontracting arrangement as well as a budget breakdown. Clearly state in the narrative who will be the Operator for the Consortium.

All costs related to the program activities described in the program design must be included on the Budget Form. The line-item description must include the type of cost and be representative of the cost category under which the cost is allocated. If applicable, bidders are required to assign a monetary value to in-kind/cash match and indicate them in their budget narrative.

For planning purposes, the Bidder should request no more than:

WorkLink: \$250,000 under this RFP. (Adult and Dislocated Funding only.)

The WorkLink WDB will enter into contracts for services beginning July 1, 2023, and ending June 30, 2024, with options for extension. A start-up period of a Service Provider not currently operating in the WorkLink will have the opportunity to begin their contract on June 1, 2023. WorkLink does not have any Youth funding available under this RFP.

Upper Savannah: \$400,000 Adult and Dislocated Worker Funding; \$150,000 in Youth Funding

The Upper Savannah WDB will enter into contracts for services beginning April 1, 2023, and ending June 30, 2024, with options for extension.

B. Instructions for Completing Budget Forms

The **Budget Summary** is a summary of allowable major cost objectives or categories by line item.

The **Budget Detail Summary** shows a single page snapshot of the cost categories included within each line item.

The **Staff, Operational Costs, and Participant Related Costs Worksheets** (included in Form C – Budget forms) present a detailed cost and price analysis of the individual allowable cost by line item and cost objectives/categories, as contained in the Budget Summary and auto-calculated in the Budget Detail Summary.

- The Budget Summary and subsequent worksheets are laid out in unison.
- The Staff, Operational Costs, and Participant Related Costs Worksheets should be completed first.
- The total of each appropriate line item should auto-transfer to the corresponding line item on the Budget Summary and the Budget Detail Summary. Bidders should double check all formulas and math for correct calculations.
- The worksheets are set up with formulas so that by filling in the yellow shaded cells, the non-yellow cells should automatically fill in.
- The totals are set to fill in the Budget Summary page as well as the Budget Detail Summary page.
- If an error is detected in the worksheet formulas, please contact WorkLink to report the problem.

The **Client Flow** and **Budget Flow** are projections of the participants to be served and funding to be spent throughout the year. Care should be taken in completing these forms.

- The Client Flow should give an accurate representation of enrollments into the WIOA program and a forecast of when exits may occur. Client Flow projections should directly link to budgeted amounts and the anticipated caseload should be used in determining staffing needs.
- The Budget Flow should give an accurate representation of when expenditures are anticipated to occur.

Successful Bidders will be held accountable for the planned outcomes stated in their response to this RFP. The planned outcomes will be negotiated between the contractor and WorkLink and/or Upper Savannah at the beginning of every program year and becomes part of the contractual agreement.

The **Staff Cost Allocation Plan** worksheet is included for planning purposes and must be completed per guidelines established in 2 CFR 200.

C. **Budget Narrative/Justification**

A Budget Narrative is required to substantiate the costs included in the Budget Forms. One should be provided to accompany the WorkLink WDB budget and one should be provided to accompany the Upper Savannah WDB budget.

General Guidance

- The budget narrative should reflect all budgeted expenditures, reflected in the items listed on the Staff, Operational, and Participant Related Costs in the budget.
- Show your math and describe the amount, the units, and how the requested item supports the goals of your program design.
- The information should be sufficiently detailed to address all potential concerns with respect to cost and need.

WorkLink Budget Requirements:

30% or more of requested funds should be allocated to participant costs or employer related reimbursement. Participants and employer related costs are reflected in the Participant Related Costs worksheet. Please note that at this time, there are no youth funds available from WorkLink for this project.

Upper Savannah Budget Requirements

30% of requested adult/dislocated worker requested funds should be allocated to participant costs or employer related reimbursement. Participants and employer related costs are reflected in the Participant Related Costs worksheet. Upper Savannah has a \$150,000 budget for youth work-based learning. At least 60% of the youth funds should be budgeted for work-based learning and the cost of salaries charged to youth business services activities which contribute to identifying worksites. Costs should be identified as work-based learning and if applicable participant costs. Please note Upper Savannah has \$10,000 to spend on computers for the operator staff. Computers will be purchased through a state resiliency grant.

Bidders should include all anticipated costs that will be incurred during the grant award period. No charges outside of the planned budget will be reimbursed.

- Grant Recipients will not be reimbursed for expenditures over 110.0% for the following line items/cost categories: Salaries, Operational Costs, Classroom Training, Supportive Services, Other Participant Related Costs, and Sub-Tier Agreements.
- Grant Recipients will not be reimbursed over 100.0% of the following cost categories: Fringe Benefits, Training Fees/Professional Fees/Profit, and Indirect Costs.

Any expenditure that will exceed the approved line-item amount must not occur prior to a modification to the grant award by the Board, otherwise these reimbursement requests will be denied.

Budget Narrative Format

Throughout the narrative, clearly label what costs will be shared between WorkLink and Upper Savannah and the proposed split. Only include WorkLink's Amount to be funded in the WorkLink budget template and Upper Savannah's amount to be funded in the Upper Savannah budget template.

The Budget Narrative should be developed in the following order:

1. **Staff Costs** - Staff salaries and associated fringe benefits necessary for direct service delivery.
 - This category does not include subcontracted professional services or staffing. These costs should be allocated to the "Other Operational Costs" category and detailed/described in the line item for each cost.
 - Please note positions related to fundraising are not allowable under WIOA.
 - Federal guidelines must be followed regarding Salary and Bonus Limitations as stated in Public Law 113-76 Section 105. See Training and Employment Guidance Letter No. 5-06 for further clarification.

Staff Budget Narrative (Justification): List each position by title and a brief job description including the function and responsibilities of each position. List positions in same order as in the Staff worksheet. The calculation should reflect the hourly wage x the planned hours of work for the grant period x the percent of time spent on work performed under this RFP.

Applicants must complete the Staff Cost Allocation Plan - Describe in detail any cost allocation plan utilized when costs are chargeable to more than one cost category, or to more than one program and/or funding source. Identify common costs. Applicants must follow the guidelines established in 2 CFR 200. A Cost Allocation Plan worksheet has been included in the Budget Worksheets – Form C. Bidders must fill out the Staff Cost Allocation Plan and submit with the Budget. The Staff Cost Allocation Plan and the Staff worksheet must match. If there are any differences, those should be explained as part of the narrative.

For fringe benefits, list each item included in Fringe Benefits, the cost basis on which fringe benefits are calculated, and the rates that are used for each. Show the math calculation. Include whether or not any rates or anticipated costs may be variable in nature.

If there are anticipated adjustments to any staff salary or fringe benefits during the budget period listed under this RFP, the bidder **MUST** include those in the proposed budget. The bidder should include in their narrative an explanation of when anticipated changes will occur and overall effect on the salaries/fringe benefits.

2. **Operating Expenses:** General costs to support WIOA program staff (separate from facility costs), including data processing costs, communications, expendable supplies and materials, outreach, staff training and technical costs, staff travel, and other related costs. Professional services may be included in this category.

Include the following sub-categories if applicable:

- a. **Facilities Costs** - For rent, show the calculation for the space. If there are MOAs, contracts, or leases associated with the rental of space, include those as exhibits. *Please review each WDB's MOU carefully. This line item should only be used to cover any new staff costs or service delivery locations described in the Bidder's proposal.*
- b. **Non-Expendable Equipment Costs** - *Please note that any item with a unit cost of \$5,000 or more will require prior written approval from WorkLink and/or Upper Savannah WDB.* Computer and printer equipment may be categorized as expendable supplies and materials, bidders should review this carefully and include in the appropriate cost category.
- c. **Data processing costs** – includes software and/or internet-based service costs, private networking costs, and others associated with the effective management and administration of the WIOA program. Note these items must be in direct support of WIOA case managers and participants located in the WorkLink and/or Upper Savannah region.
- d. **Communications**
- e. **Expendable Supplies and Materials**
- f. **Outreach**

Using the outreach plan developed in the proposal narrative, include any outreach items that will be funded under this proposal. Provide a cost estimate for each item, number of units to be purchased, and frequency to be purchased.

- g. Staff Training and Technical Costs** – For formal training and conference expenses, provide training and/or conference details such as the name of the training or conference, dates, locations, and the number of staff to attend. Include registration fees and training costs.
- h. Staff Travel (both local and out of area):**
 - *Local* – transportation costs for staff within the WorkLink and/or Upper Savannah region.
 - *Out of area* – out-of-town travel related expenses for professional staff development; include all associated fees, tolls, meals, hospitality taxes, and transportation costs.
 - Provide a copy of your travel policy.
- i. Other Operational Costs**

Operating Expenses Budget Narrative: As applicable, for each item list the number of items and the unit cost for each item. An alternate method of calculation, such as cost per unit of item (e.g., month or annual cost) or per staff would also be acceptable. Include shipping, handling, taxes, and other fees when calculating each item.

- 3. Work-Based Learning Opportunities (Payments to Participants):** Costs to support WIOA individual participants while in a work-based training activities that will be payments issued to the participant from the Service Provider or their sub-tier/contract agreement. Work Experience, Limited Internships, Transitional Jobs, and other similar Miscellaneous work-based learning models should be categorized here. Do not include On-the-Job Training.

Work-Based Learning Opportunities (Payments to Participants) Budget Narrative: Costs should be calculated by type of work-based learning opportunities offered under this RFP. The number of participants multiplied by the average hourly rate multiplied by the average number of hours to be worked multiplied by the percentage to be funded by WIOA. Costs should be broken down into wages and fringe benefits. Include specific details and any fees related to sub-tier agreements.

- 4. Payments to Employers:** Costs to support WIOA individual participants while in a work-based training activities that will be payments issued to the employer from the Service Provider. On-the-Job Training and other similar Miscellaneous work-based learning models should be categorized here.

Payments to Employers Budget Narrative: Costs should be calculated by type of work-based learning opportunities offered under this RFP. The number of participants multiplied by the average hourly rate multiplied by the average number of hours to be worked multiplied by the percentage to be funded by WIOA. Costs should be broken down into wages and fringe benefits.

- 5. Other Participant Related Costs:** Costs to support WIOA individual participants while in a training activity not otherwise listed above. Assessment costs for TABE, Career Readiness Assessments, and other similar activities should be included in this cost category.

Other Participant Related Costs Budget Narrative: List each type of item with a unit cost x number of units. Number of units should be related to the number of participants that will receive the item.

6. **Sub-Tier Agreement:** Costs to be sub-granted to a provider of services for a specific purpose in support of WIOA program goals and will provide those services directly to WIOA participants. (Example: soft skills training.)

Sub-Tier Agreement Related Costs Budget Narrative: List each Sub-Tier Agreement and associated cost. For this category provide a thorough description of the services or activities to be delivered, the organization providing the services, and planned outcomes, including the number of participants to be served and the impact these services will have on achieving performance. Include the agreed upon budget and contract or MOA as an exhibit.

7. **Training Fees/Professional Fees/ Profit:** This category may include profit, professional fees, audit costs, insurance costs, etc.

Training Fees/Professional Fees/ Profit Budget Narrative: Provide a description and estimated cost associated with items listed under this category. For each item, list the number of items and the unit cost for each item. An alternate method of calculation, such as cost per unit of item (e.g., month or annual cost) or per staff would also be acceptable.

For those requesting profit – Under Cost Reimbursement contracts, criteria for profit may be established by the LWIOA and may be used to evaluate proposers request for payment of profit. Payment of profit to the selected proposer may be payable on a monthly, quarterly, mid-year, or end of year (closeout) basis. The proposer should propose criteria for profit based on SMART goals developed in this proposal and a schedule of payment as part of the budget narrative. Goals that are focused on achieving WIOA performance measures are strongly encouraged.

In order to earn profit allotted in the grantee's budget, the grantee must provide trackable data and reports upon request in a manner that enables the LWDA to comply with requests and reporting requirements of SCDEW and USDOL and make timely payments to vendors and employers. All reports must be verifiable by WorkLink and/or Upper Savannah WDB staff.

All criteria proposed must be Specific, Measurable, Achievable, Realistic and Timely (SMART goals). Profit margins should not exceed ten percent (10%) of the Contract. Criteria for Profit will be reviewed and included in negotiating final contracts.

8. **Indirect Costs:** This category may only be used by organizations with an Indirect Cost Rate approved by an authorized federal or state agency. A copy of the Indirect Cost Rate Proposal approved by the cognizant federal agency must be attached.

An award recipient that proposes to use federal grant funds to pay for indirect costs but has never received a federally negotiated indirect cost rate may elect to charge a de minimis rate of up to 10% of its modified total direct costs (MTDC) which may be used indefinitely.

Indirect Costs Budget Narrative: Please provide a simplified description of your indirect cost rate and how it will be applied.

9. **Budget Flow:** Planned Budget expenditures by month should be included in the Budget Flow chart tab.

Budget Flow Narrative: Provide a description of planned monthly expenditures and variances. The budget flow should not reflect the same amount to be spent every month. Careful forecasting for budget expenditures should be used.

10. **Client Flow:** Planned WBL opportunity placements by month and by type should be included in the Client Flow chart tab along with the anticipated split between Adult/DW funding and successful and unsuccessful completions.

Client Flow Narrative: Enter your planned monthly WBL opportunity placements by WBL type, funding, and success into the chart. Provide a brief explanation of how you arrived at these numbers.

11. **Supportive Services Supplement:** In the Budget Worksheets a Supportive Services supplement form has been provided. Show the supportive services that may be needed in support of participants attending WBL opportunities.

Supportive Services Supplement Budget Narrative: Costs should be calculated by each type of supportive services needed to support participants in WBL opportunities offered under this RFP. The number of participants multiplied by the average amount of supportive services to be issued to participants or vendors multiplied by the average number supportive service payments to be made. Include a brief explanation. (NOTE: supportive services will not be awarded under this RFP; however, requested funds will be made available to appropriate program in support of WBL opportunity participants.

12. **Participant Cost Rate:** Calculate the proposed Participant Cost Rate (WBL Opportunities funding requested) divided by the total amount of the requested grant amount. Provide an explanation as to why it meets, falls short or exceeds 30% of the total budget.

13. **Cost Per Participant:** Calculate a cost per participant and provide an explanation on how you arrived at this rate.

At the end of the Budget Narrative, please affirm the following:

- *General Liability Insurance* – Assure that all persons authorized to receive or deposit workforce development funds, or to issue financial documents, checks or other instruments of payment for job training program costs will be bonded for protection against loss. Identify all positions that are authorized to receive or deposit workforce development funds, issue financial documents, checks or other instruments of payment for workforce development program costs. The individuals in these positions must be bonded in a minimum amount of the contract award. Identify the insuring agency, policy number, term of the bond, and the total dollar amount of the bonding coverage.
- *Record retention* – Assure that all financial and program records, including any supporting documents, will be retained for at least three years from the date of the WDB's submission of close-out reports. Assure that if any litigation, claims or audits are begun prior to expiration of the three-year period that all records shall be retained

until such litigation, claims or audits relating to the records have been resolved. Assure that records relating to non-expendable personal property that are authorized to be purchased with workforce development funds will be retained for at least three years after the final disposition of the property.

- *Invoices & reconciliation* – Assure that the actual and accrued expenditures will be reported on invoices and that reconciliation between actual and accrued expenditures will be conducted on a payment-by-payment basis.
- *Generally accepted accounting principles* – assure that the agency will utilize generally accepted accounting principles in order to account for and control all workforce development funds.
- *Program income and stand-in costs* – Any program income received as a result of this contract must be reported to the WDB. Program income must be used prior to payment of any workforce development funds. Assure that any program income earned as a result of the contract for services will be used for job training purposes only. The use of program income against workforce development services must be documentable and traceable through the financial system. It must be reported as part of the invoice.
- *Procurement* – In order to ensure fiscal accountability and prevent waste, fraud and abuse in programs administered under the Workforce Innovation and Opportunity Act, the applicant shall have a procurement system, which adequately provides, maximum, free, and open competition. To accomplish this, applicants must have a system which: 1) provides for full and open competition, 2) has written procedures for procurement transactions, and 3) has a code of ethical standards, which adequately provide for the avoidance of any conflict of interest.

PART 7: EVALUATION CRITERIA AND RATING SYSTEM

A. Evaluation Panel Briefing

The Chairperson of the Workforce Development Board (WDB), or his/her designee, will address each of the following areas with the review panel before the evaluation process begins.

1. Conflict of Interest – Does any member of the panel have a conflict of interest by sitting on the evaluation panel? The following are examples of conflicts of interest: (1) Part ownership in company; (2) Family member works for or has part ownership in company; and/or (3) any other reason a member of the evaluation panel cannot give an impartial decision.
2. Independent Evaluation – Each member of the evaluation panel must score each and every proposal independently. Members may not confer with each other in determining a score and no two proposals can be compared to each other for the purposes of determining scores.
3. Rating Structure – The evaluation points for each award criteria will be assigned before the evaluation process begins.
4. Documentation of Scoring – Each member of the evaluation panel must support their reasoning with appropriate documentation and explanation.
5. Oral Presentation – The panel may feel that an oral presentation is necessary to reach a final decision

6. Protest Hearing – All decisions by the panel are subject to protest. Each member and/or the whole panel may be called upon to explain or defend each rating.
7. Confidentiality – Anything discussed during the whole evaluation process is to be considered confidential.

B. Rating System

1. Program Proposal Synopsis – 5 points

- Does the mission, vision, and main purpose of the Proposer match WorkLink and/or Upper Savannah’s vision of the SC Works System, the role of the Operator, the Center Management with Job Seeker focus, and the Business Services role?
- Are the target groups clearly identified, to include priority populations, and does the proposer have the ability to reach these groups? Do they include the location of services?
- Has the proposer clearly outlined the goals and objectives of the program? Has the proposer described outcomes which are acceptable? Are the goals and planned outcomes SMART (Specific, measurable, attainable, realistic, and timely)? Are the goals and objectives consistent with the remainder of their RFP response?
- Does the application demonstrate an understanding of information requested and conform to the requirements of the RFP?

2. Experience, Capacity & Past Performance - 20 Points

Points will be given based on the proposer’s ability to demonstrate it has the resources and expertise to operate a federally funded workforce development system of comparable size and scope. Technological, management, administrative and staff capabilities along with physical space, location, and capacity of the program site are reasonable. The proposer demonstrates a history of successfully implementing workforce development systems and achieving benchmarks. This includes evidence of established and strong employer and partner relationships, demonstrated experience placing jobseekers into employment and previous experience and performance on contract agreements of similar size and scope. Experience integrating and coordinating services with mandated WIOA partners, and non-WIOA service agencies has been demonstrated in the application. If the bidder has not operated a One Stop Center or provided Business Services previously, the information provided, and experience described is for a similar type of employment and training center.

Experience

- In regard to delivery of service, does the proposer have the demonstrated background and experience in providing employment and training services to target customers, and specifically to categories of job seekers and workers with characteristics similar to those found in the WorkLink and/or Upper Savannah WDB’s service area? Does the proposer have the successful experience in leading and managing multi-partner agencies?
- In regard to facility management, does the proposer have the background and experience in operating SC Works Centers or similar employment and training centers?
- Is the proposer’s previous experience relevant and adaptable to the “Functional Supervision” model?

Financial and Administrative Capacity

- Does the bidder have the administrative, fiscal, and reporting capacities to operate the SC Works System, Center Management, Business Services, and WBL opportunities in the WorkLink and/or Upper Savannah region? Does the description of the organization's financial processes and procedures indicate sound financial management? Are internal controls in place?
- Has the proposer demonstrated ability to safeguard federal funds? Does the proposer have the ability to repay disallowed costs if such disallowances are made in the monitoring or audit of the contract? Does the availability of this source and the amount available provide security the Workforce Development Board needs to contract with the entity?
- Does the proposer have a history which is not characterized by fraud or criminal activity of a significant nature? Does the proposer have a history which is not characterized by administrative deficiencies and/or disallowed costs? Does the proposer have a history which is not characterized by failure to comply with audit, monitoring, or reporting requirements that has been ongoing for two or more consecutive years?
- Do they have clear procurement and inventory tracking policies and procedures?
- Does the bidder have a clear method for tracking staff time? Are appropriate fringe benefits included and will they be made available to staff within a reasonable amount of time?
- Is the travel policy included and provides fair compensation for staff required to travel for work purposes?
- Are there policies and procedures in place to ensure fair and equitable treatment for all staff?
- Does the proposal include a clear plan for how they will self-monitor for compliance with the grant awards and the WIOA act and regulations, addressing both programmatic and financial components?

Staffing Plans

- Does the bidder have the organizational structure to properly administer the One Stop system proposed? Is organizational support (or corporate support) evident and adequate for the start-up period of a new contract? Does the support include ongoing technical assistance?
- Does the bidder include a current or proposed organizational chart and job descriptions for all budgeted staff? Does the proposed staff have the appropriate education and/or experience to provide the services outlined? For vacant positions, is the required education and experience of applicants sufficient to enable the proposer to carry out the services as described in the proposal?
- Does each position have a percentage of time allocated to the WorkLink and/or Upper Savannah region and is reasonable for successful operations and carrying out of the services described in the RFP? Is the ratio of proposed frontline staff compared to oversight positions appropriate?
- Do staff development plans include a variety of learning opportunities, methods, and topics relevant to job seeker and business services? Does it include online and in-person opportunities and a variety of workshops, conferences, seminars, professional organizations and/or other activities to stay current for workforce development related topics?

Past Performance

- Do the results of the proposer's most recent contract(s) demonstrate successful performance? Has the proposer demonstrated successful management of an SC Works Center(s) (or equivalent) as demonstrated by successful relationships, monitoring, and customer satisfaction?

- Are the outcomes reported in Form E, Past Performance relevant to the scope of the RFP and indicative of success?
- Did the most recent monitoring of the organization require correction by the monitor or auditor? If yes, has improvement been realized in those areas and/or was the plan of correction acceptable?
- Is the latest applicable financial audit available in the proposal submission? If not, does the bidder explain the reasons why it was not included and seem reasonable? If present, is the audit clear of findings? If not, do the findings present a reasonable explanation and corrective action?

3. Program Design - 20 Points

A successful proposal will demonstrate the ability to design and effectively implement a One Stop system of partners and services that will meet employers' and job seekers needs, including priority populations. Points will be awarded to proposers whose program design includes (1) the development and maintenance of a comprehensive system of collaborative partnerships with workforce development agencies (WIOA mandated and non-mandated) in the region and in the SC Works Centers, (2) improving customer service satisfaction, (3) providing quality, data driven services, and (4) dedicating specific resources to Center Management with Job Seeker Services and Business Services.

Throughout the Program Design section, does the proposer address the following?

- A description of the Bidder's vision.
- How their vision supports the Scope of Services described in Part 3 of this RFP and in coordination with the deliverables described, WorkLink and/or Upper Savannah's Local Plan, One Stop Certification Standards, and/or Memorandum of Understandings.
- A solid, realistic plan to carry out this vision based on SMART goals. The specifics of each SMART goal should be included in response to each topic.
- Has the Proposer clearly outlined the SMART goals and objectives associated with effective implementation? Has the Proposer proposed specific metrics to measure performance levels (units and quality of service)? Are associated timelines appropriate and achievable?
- Does the proposer offer any innovative approaches that further workforce development strategies? Do those innovative approaches directly influence or aid the outcomes and goals laid out in this proposal? Do the innovations proposed further WorkLink and/or Upper Savannah's mission and vision? Are the innovative approaches described accompanied by research or supporting documentation?
- Do the proposer's responses include ways that they will use technology to deliver services and further connect with partners and the community at large?
- Does the proposers' response address dedicated resources to Business Services and dedicated Center Management with Job Seeker Services? Do these two areas of focus on their respective areas of expertise, but also in tandem to present as one united front?

Start-Up

- If not currently a One Stop Operator in the WorkLink and/or Upper Savannah region, does the bidder include a start-up plan? Is the plan thorough and well thought-out? Are the timelines and goals associated with start-up reasonable?

- If currently a One Stop Operator in the WorkLink and/or Upper Savannah region, does the bidder include a start-up and transition plan for WBL opportunities and Business Services? Is the plan thorough and well thought-out? Are the timelines and goals associated with start-up reasonable?

Service Delivery & Partner Coordination – 15 points

- Does the proposer give a clear and concise description of their plan or vision for the WorkLink and/or Upper Savannah region SC Works system? Does it describe proposed staff roles and division of responsibilities, one focusing on center management and job seeker services and one focused on business services and WBL opportunities. Does it address the locations of service and customer groups to be served, including priority populations and low-income communities? Does it support the vision and mission of the WDB? Are the identified customers and partners appropriate and do they reflect the population within the WorkLink and/or Upper Savannah region?
- Are the appropriate partners included in the program design? Are the roles clearly defined and appropriate? Are letters of support from the partners included? Does the Proposer describe their approach to managing partner agencies and is it reasonable? Will their approach foster positive partner relationships with the system? Will the partner agencies have appropriate opportunities for input?
- Does the Proposer present an acceptable plan working with the partners in which they demonstrate a sustainable ability to place skilled and other workers with employers seeking to find appropriately skilled workers to fill job vacancies in their organizations?
- Does the Proposer have knowledge of all SC Works Partners necessary to effectively manage multi-SC Works Centers and satellite sites? Does the Proposer describe the SC Works Partners to be utilized at local SC Works Sites? Are the roles and expected contributions of the various SC Works Partners clearly defined?
- Does the proposer use non-mandated partners to further workforce development goals? If so, do they include a clear explanation of that partner's services and the roles and responsibilities they will have in the SC Works system?
- Does the Proposer recognize and have the capability to provide or arrange for job seekers, through a coordination of referrals with other public sector partners, community-based organizations, and private businesses appropriate career and training services or financial assistance?
- Does the Proposer present an acceptable plan working with the partners in which they demonstrate a sustainable ability to place skilled and other workers with employers? Do they share a goal of meeting performance measures? Does the partner model encourage non-duplication of service, open communication, collaboration, and innovation in meeting employer needs?
- Does the bidder include key elements from the PY2022 MOU in their vision? Does it include how they will manage conflict when it arises.

Individuals Requiring Long Term Services

- Does the bidder include processes and procedures that encourage all populations to use the SC Works Centers? Are appropriate plans in place to prevent roadblocks to serving priority populations?
- Does the proposer include self-monitoring practices? Does the response include ways to provide access and targeting of outreach to priority populations?

SC Works Center Management

- Does the bidder have a solid plan on how they will manage partners and the Center facilities? Does the bidder include a vision for the resource room and explain what resources will be available and how it will further a customer's job seeking experience or address barriers that job seekers might face? Do they include training opportunities and funding options?
- Does the bidder include key elements from the SC Works Certification Standards in their vision?
- Does it include specific roles and responsibilities of frontline staff and management? Does it include customer service standards and plans for how to communication will flow between management and staff?
- Does it address Center Management with Job Seeker focus and Business Services?

Business Services

Points will be awarded based on the proposer's ability to demonstrate a reasonable, executable plan for developing and delivering career services in conjunction with the business service integration team to local area businesses.

- Does the proposer describe their approach to delivering business services? Do they include all relevant career services for employers?
- Does the proposer describe how they will utilize labor market information and employer feedback to drive the SC Works Centers and the workforce system? Is the approach appropriate, comprehensive, and in-depth? Does the proposer address sector strategy implementation? Are the proposed plans appropriate? Do they include plans to convene and participate in industry focus groups and sector strategy partnerships?
- Does the proposer include how they will incorporate training services into service delivery?
- Does the proposer include a description of the SC Works system and their vision of how employers may utilize the Centers and available services to hire their workforce?
- Does the proposer include a vision of how they will serve employers and customers affected by layoffs and Rapid Response events?
- Does the proposer include how they will collect, and track customer satisfaction surveys businesses utilizing local area Business services and implement solutions to address deficiencies? Do they include the contents of what will be in the survey?
- Do they include how they will convene Business Service Integration Teams and how they will coordinate business services within the team?

Career Services

Points will be awarded based on the proposer's ability to demonstrate a reasonable, executable plan for developing and delivering career services in conjunction with partners and Center staff.

- Does the proposer describe their approach to delivering job seeker services? Do they include all relevant career services for job seekers?
- Does the proposer describe how they will utilize labor market information and employer feedback to drive the SC Works Centers and the workforce system? Is the approach appropriate, comprehensive, and in-depth? Does the proposer address career pathway? Are the proposed plans appropriate?
- Does the proposer include how they will incorporate training services into service delivery? Do they emphasize lifelong learning and propose actionable ways to promote the importance of lifelong learning?

- Does the proposer include a description of the SC Works Centers to include their vision of the resource room, planned services, and resources that will be made available to job seekers and to employers?
- Does the proposer include a vision of how they will serve customers affected by layoffs and Rapid Response events?
- Does the proposer include how they will collect and track customer satisfaction surveys to job seekers utilizing SC Works Center services and implement solutions to address deficiencies? Do they include the contents of what will be in the survey?

WIOA Funded Work-Based Learning Opportunities

Points will be awarded based on the proposer's ability to demonstrate a reasonable, executable plan for developing and executing a WBL opportunities program in coordination with the Adult/DW program service provider.

- Does the provider propose to offer WBL Opportunities? Will they meet the employer needs of the WorkLink and/or Upper Savannah region?
- Are the sub-tier agreements in place appropriate, necessary, and of reasonable cost to accomplish the delivery of WBL Opportunities?
- Do they include placement goals, anticipating successful and unsuccessful completions, including a cost per participant analysis? Are these goals appropriate for the amount of funding requested? Is the cost per participant at a reasonable level?
- Do they expound on their start-up plan to include how they will coordinate with Adult/DW program to enroll, case manage, and issue supportive services for participants being placed in WBL opportunities?
- Do they have an effective, well-thought-out process for tracking obligations and payments?
- Do they have a plan to consistently address soft skills and basic skills, prior to and during placement on a WBL opportunity? Do they include how they will monitor implementation of soft skills and basic skills during the WBL opportunity?
- Do they propose an evaluation tool to document progress and skills progressions during the WBL opportunities, including a timeline of when evaluations will occur? Do they describe the contents of the evaluation?
- Do they propose an evaluation tool to document work site safety during the WBL opportunities, including a timeline of when evaluations will occur? Do they describe the contents of the evaluation?
- Do they address how they will promote WIOA funded business services? Do they address how they will conduct recruitment and outreach to potential WBL opportunities from WIOA caseloads, from partners, from employers, and from the general public?

Provide Workforce Services in the Community

Points will be awarded based on the proposer's ability to demonstrate a reasonable, executable plan for delivery of services to jobseekers and employers that are in priority populations and remote hard-to-reach communities. The proposed service delivery methods within their narrative provide promising results based on sound research, demonstrated best practices, and appropriate funding.

- Do they have an actionable plan for providing services in the community? Do they include priority populations and hard to reach communities in how they will strategically offer services?

- Do they have a thorough, well-thought-out plan for developing, establishing, and maintaining Access Points?

Outreach – 15 points

Points will be awarded based on the proposer's ability to demonstrate a reasonable, executable outreach plan for the SC Works Centers and workforce development services. The proposed outreach methods proposed within the application provide promising results based on sound research, demonstrated best practices, and appropriate funding.

- Does the proposed plan offer a comprehensive approach to providing outreach? Does it include a variety of methods (i.e., print, community involvement, social media, etc.)?
- Is the associated budget reasonable?
- Does the plan include all target customers? Does it include hard-to-reach communities and priority populations? Does it include Limited English populations, priority populations, EO and ADA groups?

Subcontracting

If the proposer is subcontracting, are the agreements fully described? Are the Subcontractors delivering appropriate services for an appropriate amount?

4. Budget and Financial Information - 25 Points

Points will be awarded to the extent to which the proposed budget will realistically finance the service and goals of the program. This includes the likelihood that the proposed service strategy will result in achieving the proposed goals; the accuracy of the budget; the direct-staff-to-customer ratio; the amount and type of funds that will be leveraged towards achieving program outcomes; and overall cost effectiveness of the proposed services. Points will be awarded to agencies with sound fiscal practices and procedures, fiscal capacity, and track records of successful fiscal management of similar sized federally funded projects.

- Are the salaries, fringe, indirect cost, and/or profit (amounts or rates) appropriate for the required services?
- Are overall costs reasonable in terms of the activities to be provided and the performance outcomes to be achieved?
- Was the budget detailed and accompanied by a budget narrative? Was each budget line item supported with an explanation of activities to be carried out? Were calculations included throughout the budget narrative?
- If proposed, were Criteria for Profit easily understandable? Were the criteria proposed based on SMART goals (Specific, Measurable, Achievable, Realistic and Timely)? Were the goals quantified and easily tracked? Was the schedule of payments clear and easily understood? Was the schedule of payments distributed reasonably across the program year?
- Do the customer and expenditure flow sheets have accompanying explanations?

PART 8: SELECTION & POST-SELECTION

The selection process will be conducted by WDB Staff, WDB Board members, and as appropriate, outside experts on WDB activities, utilizing a fair and objective process and adhering to federal, state and ACOG procurement policy. The WorkLink and/or Upper Savannah WDB will make the final decision.

A. PROPOSAL REVIEW PROCESS

The proposal review process includes two distinct reviews:

1. **Technical Review:** Following receipt, all proposals will undergo a technical review by WorkLink and/or Upper Savannah WDB staff to determine that the proposal is properly formatted and includes all of the required sections, signatures, and related forms/attachments requested in this RFP (Form A: Proposal Checklist).

Those proposals passing the technical review will be forwarded to the Selection Committee for evaluation. Those proposals that fail the technical review will be forwarded to the Selection Committee for final confirmation of non-responsiveness.

2. **Programmatic Review/Evaluation:** A Selection Committee (also called an ad hoc RFP Committee of the Board) comprised of WorkLink and Upper Savannah Board members with direct knowledge and experience of issues facing WorkLink and/or Upper Savannah's target customers will comprise the Selection Committee and provide an objective review and assessment of proposals. Each proposal will be scored and ranked based upon the evaluation criteria outlined in the RFP. Proposals that illustrate innovation in delivering the most comprehensive and broadest range of services for a reasonable cost while complying with established guidelines for achieving required performance measurements will receive higher scores.

WorkLink staff will compile funding recommendations based upon the outcome of the Selection Committee and will forward recommendations to the WDB for final approval. WorkLink and/or Upper Savannah WDB may require the bidder(s) selected to participate in negotiations to submit revisions to pricing, technical information and/or other items from their proposal(s).

Note: Amended Section 8-13-420 of the 1976 Code of Laws of South Carolina states: including a promise of future employment to influence his actions, vote, opinion, or judgment as a public official or public employee or such public official solicits or accepts such compensation to influence his action, vote, opinion, or judgment shall be subject to the punishment as provided by 16-9-210 and 16-9-220."

B. CONTRACT NEGOTIATIONS

*It is WorkLink and Upper Savannah Workforce Development Board's intent to select a service provider(s) to serve both areas. The selected provider(s) will be awarded two grants (one from each Board). However, both Boards reserve the right to select the service provider(s) with the best proposal for their area, even if they are not the same service provider(s). If this occurs, the selected bidders will be able to negotiate with the appropriate Workforce Development Board to ensure that necessary funding is made available to accomplish the vision set forth in their proposal.

The completion of this evaluation process will result in the bidders being numerically ranked. The bidder ranked first will be invited to participate in contract negotiations with each of the WDBs.

If negotiations between one of the WDBs and the first ranked bidder do not result in an agreement as to the contract terms within a reasonable timeframe, that WDB may terminate the negotiations and begin negotiations with the

bidder that is next in line and proceed down the list as necessary until an agreement is reached or the list is exhausted. WorkLink and/or Upper Savannah will not enter negotiations with a bidder that has a cumulative score below 70.

The contract amount (including reimbursables) shall be a “not to exceed amount,” to be established based upon a mutually agreeable Scope of Services and budget.

C. CONTRACT AWARD

Upon authorization to award the contract by the Board and completion of necessary documents, the WDB will issue a Notice to proceed to the successful bidder.

The selected bidder and its other members will be required to maintain auditable records, documents, and papers for inspection by authorized local, state and federal representatives. Therefore, the bidder and its other members may be required to undergo an evaluation to demonstrate that the bidder uses recognized accounting and financial procedures.

WorkLink WDB may require the bidder(s) selected to participate in negotiations to submit revisions to pricing, technical information and/or other items from their proposal(s). All contracts and terms will be negotiated prior to execution of a grant. Criteria for Profit may apply.

Per 2 CFR 200 procurement guidance, WorkLink and/or Upper Savannah WDB has the option to extend a contract with a Service Provider pending the following caveats are met:

- The grant should not exceed 4 total years.
- The grantee must meet or exceed performance.
- The administrative entity and the grantee must negotiate each budget year.
- The administrative entity will issue performance measures each year after negotiating with the State.
- These conditions may change pending further guidance from the State or from USDOL.

If, in the course of the RFP process or in the administration of a resulting Contract, WorkLink and/or Upper Savannah WDB determines that the Bidder has made a material misstatement or misrepresentation, or that materially inaccurate information has been provided to the WorkLink and/or Upper Savannah WDB, the Bidder may be terminated from the RFP process; or in the event a contract has been awarded, the contract may be immediately terminated. In the event of a termination under this provision, WorkLink and/or Upper Savannah WDB is entitled to pursue any available legal remedies.

D. ADMINISTRATIVE REQUIREMENTS OF CONTRACTORS

1. Record of Hours Worked or Time Sheet - The selected bidder will be required to maintain a record of “Hours Worked or a Time Sheet” on all staff members funded in full or in part with WIOA funds as a result of any contractual agreement resulting from this RFP. Such records shall reflect actual hours worked, annual and/or sick leave hours taken, personal days, and holiday hours taken per pay period. The record of hours worked, or time sheet shall be signed by the employee and the employee’s supervisor. The record or the time sheet must also reflect the time allocated to any and all WIOA projects, as well as any other non-WIOA projects.

2. Professional Development of WIOA Funded Staff - The Program Manager should support the continued professional development of its fully or partially WIOA funded staff through attendance at WIOA related professional development training opportunities and WIOA announced Service Provider meetings. Prior approval is required for training opportunities, travel, and incurred expenses outside of the local WIOA region.
3. Fiscal Record Keeping - The bidder's administrative and fiscal capabilities will be assessed by a preliminary review of compliance documents, which must be completed before Contracts are finalized. WorkLink and/or Upper Savannah staff may visit or request supporting documentation from the offering entity to affirm certain items of the survey. Any serious discrepancies found will be brought to the attention of the WorkLink and/or Upper Savannah Workforce Development Board prior to finalizing the contract award and could result in the cancellation of the commitment to fund.
4. Subcontracting - The bidder may purchase or subcontract for the services and/or activities specified in the Scope of Work and Budget of the contract only with the prior written approval of such subcontracts and subcontractors by the WDB, and in accordance with procurement requirements in the Uniform Guidance (2 CFR 200) and the SC Appalachian Council of Governments procurement policy. The bidder, in subcontracting of any of the services and/or activities hereunder expressly understands that in entering such subcontracts, the WDB is in no way liable to the subcontractor. In order to assure the WDB of strict performance of this Section, the bidder must submit to the WDB subcontract agreements for review upon request.
5. Reporting - All selected bidders will be required to provide monthly, bi-monthly, or quarterly progress reports of program performance and expenditures in comparison to the deliverables agreed upon in the grant. WorkLink and/or Upper Savannah has forms that may be used by the selected bidder, or the selected bidder may propose their own reporting forms.

Selected bidders awarded a grant will be required to submit a Monthly Request for Payment Invoice and Financial Status Report – Supplemental form to the WorkLink and/or Upper Savannah Workforce Development Board staff by the 10th calendar day of each month. Appropriate supporting backup documentation for the requested payment must be attached to each invoice submitted. Successful bidders awarded a grant will also be required to submit an Annual Financial Closeout Report to WDB Staff by August 10 (or the Friday before).

6. Audits - In accordance with 2 CFR Part 200 and 2 CFR Part 2900, successful proposers must submit all finalized audit reports to the Awarding Entity within thirty (30) calendar days of receipt. All WIOA funding will be subject to the OMB circular 2 CFR Part 200 and 2 CFR Part 2900. The successful bidder will need to be familiar with the OMB circulars and should reference TEGL 15-14 and Implementation of Uniform Guidance Regulations for further information.
7. Monitoring & Evaluation - The selected bidder will be required to develop internal monitoring procedures to ensure that program operations are conducted in compliance with the WIOA Final Rules and Regulations, and any contractual/grant agreement resulting from this Request for Proposal.

8. Documents Required of Selected Bidders - Successful proposer or offeror will be required to provide the following information prior to the effective date of the grant (complete Form H, Request for Compliance Documents for preliminary information requested):
 - Current fiscal statement and copy of last audit
 - Bonding agreement
 - Evidence of signatory authority
 - Financial reporting signatory authority
 - Copy of indirect cost plan and approval letter by cognizant agency
 - Suspension and debarment certification
 - Staff cost allocation plan/rate for Adult Program/Youth Program (Budget Template Form)
 - Certification of drug free workplace
 - Certification of lobbying activities
 - Federal ID Number
 - List of current board members of governing body
 - Organizational chart
 - Grievance procedures
 - Staff/personnel travel policies
 - Charter and by-laws of organization
 - Banking agreements
 - Copy of General Liability Policy
 - Job Descriptions of Personnel Funded by WIOA (fully or partially)
9. Participant Time and Attendance - Successful bidders awarded a grant will be required to document participant's time and attendance throughout the period the participant is receiving training or supportive services. Participants abide by the attendance policy of the training provider. Time sheets must be signed by the participant and verified by the case manager, classroom instructor, training, or worksite supervisor, and maintained in the customer's official WIOA file folder.
10. Participant Files - Successful bidders awarded a grant will be required to maintain WIOA participant files (either in a hard file or electronic file) as specified in any contractual agreement resulting from this RFP.
11. Payments Made on Behalf of Participants - Participants may be eligible to receive supportive service payments and/or needs-based payments. Bidders will be required to make sure that there are checks and balances between the maintenance of timesheets or other source documents, and the cutting and distribution of checks on behalf of the participants. Failure to document fully the basis for issuing any of the aforementioned payments made on behalf of participants may result in disallowed costs. The contractor must reimburse disallowed costs to the local Workforce Investment Area from Non-WIOA fund sources.

12. Refund Policy - Bidders who become contractors will be required to establish an internal refund policy and procedure for retrieving any unused tuition funds when a WIOA participant enrolled in tuition-based training concludes early.
13. Affirmative Action - (Executive Order 11246, as amended by Executive Order 11375, and Sections 503 and 504 of the Rehabilitation Act of 1973, as amended) Executive Order 11246 prohibits employment discrimination on the basis of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin.

Institutions or agencies with federal grants or contracts of \$50,000 or more and 50 or more employees are required to develop a written Affirmative Action Plan to overcome the effects of past discrimination and to facilitate optimal utilization of qualified women and minorities throughout the workforce. An Affirmative Action Plan must contain a workforce utilization analysis to identify those areas in which women and minorities are under-utilized, a review of all employment policies and practices to identify and to eliminate any sources of discrimination, and a statement of numerical goals and timetables for the correction of any under-utilization identified. Although the grant or contract may involve only one unit within the institution or agency, the Affirmative Action Plan must cover all employees throughout the institution.

14. Section 504 of the Rehabilitation Act of 1973 - as amended, prohibits discrimination based on disability. Section 503 of the Rehabilitation Act of 1973 prohibits discrimination and requires employers with federal contracts or subcontracts that exceed \$10,000 to take affirmative action to hire, retain, and promote qualified individuals with disabilities.

The recipient/subrecipient/subgrantee will not discriminate against any employee or applicant for employment or training because of physical or mental disability in regard to any position for which the employee or applicant for employment is otherwise qualified.

The recipient/subrecipient/subgrantee shall establish an Affirmative Action Plan for outreach to, and training, placement and advancement of, individuals with disabilities in employment and training programs under the Act.

14. South Carolina Law Clause - Upon award of a grant under provisions of this Request for Proposal, the entity to whom the award is made, must comply with the laws of South Carolina, which require such entity to be authorized and/or licensed to do business in the State. Notwithstanding the fact that applicable statutes may exempt or exclude the successful proposer from requirements that it be authorized and/or licensed to do business in the State; by submission of its signed proposal, the proposer agrees to subject itself and agency to the jurisdiction and process of the courts of the State of South Carolina as to all matters and disputes arising or to arise under any contract and the performance thereof, including any questions as to the liability for taxes, licenses or fees levied by the State.

15. Indirect Costs - All proposers or offerors who include indirect costs as a part of their proposal budget must have an indirect cost plan approved by their cognizant agency. Proposers or offerors must include a listing of all items included in the indirect cost pool.
16. Insurance for Participants - The South Carolina Department of Workforce (SCDEW) will provide adequate Accident Insurance Coverage for WIOA participants participating in training conducted in a typical classroom training environment, and for WIOA participants while they are participating in training conducted in a typical work experience or limited internship mode (generally, training conducted on an employer's work site). The selected bidder will be required to provide general liability insurance certificate coverage and verification obtained annually as part of compliance documents.

E. APPEALS PROCESS AND PROCEDURES

Any bidder who has submitted a proposal may appeal an award announcement. The process for appealing an award is as follows:

All appeals must be submitted in writing to the WDB within fifteen (15) working days of the award announcements addressed to Melanie McLane, Board Chair (c/o: Trent Acker, SC Works Clemson, 1376 Tiger Blvd, Suite 102, Clemson, SC 29631) to review to determine merit. In order for an appeal to be found to have merit, it must show that any substantial portion of the RFP process or a federal or state law was violated. Only appeals that cite the specific section(s) of the RFP or specific statutes that have been violated will be considered.

Appeals will not be accepted for any reasons other than those stated above. Appeals received after the established deadline will not be accepted. Appeals may not dispute a particular score, or funding level received by the petitioning bidder, or the scores assigned to a competing bidder.

If an appeal is found to have merit, it will be evaluated by the Executive Committee of the WDB. Following the Executive Committee's evaluation, the appeal will be brought to the full WDB for review. The decision made by the WDB and approved by the County Council, where applicable, will be final.

PART 9: FORMS

Forms:

- Form A – Proposal Checklist
- Form B – Proposal Cover Sheet
- Form C – Budget Forms
- Form D – Master Summary of Goals
- Form E – Past Performance
- Form F – Organization Reference Form
- Form G – Conflict of Interest
- Form H – Proposal Rating Sheet
- Form I – Compliance Documents