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**Request for Proposal  
#22-WIOA-02**

**Adult and Dislocated Worker Workforce Development 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)**

Administered by:

<p>WorkLink Workforce Development Board 1376 Tiger Blvd, Suite 102 Clemson, SC 29631 (864) 646-1515 TTY 711 <a href="http://www.worklinkweb.com">www.worklinkweb.com</a> Trent Acker, Executive Director</p>	<p>Upper Savannah Workforce Development Board 430 Helix Road Greenwood SC 29646 (864) 941-8050 <a href="http://www.upperscworks.com">www.upperscworks.com</a> Ann Skinner, Workforce Development Director</p>
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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 \$1,254,201.

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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 deliver Title I-B, Adult and Dislocated Worker Program 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). **The planning amount for services delivered under this RFP in the initial year of performance is \$600,000 (WorkLink) and \$600,00 (Upper Savannah with fifteen-month period) of which 100% is federal funding.**

**Type of Subaward:** Cost reimbursement subaward

**Anticipated Sub-award 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 and successful performance of the service provider. 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

RFP Release Date: November 21, 2022

the availability and appropriation of funds. The WorkLink WDB and the Upper Savannah WFD reserve 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 the 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. If proposers do not wish to start until July 1, 2023, that is acceptable. Total funding for Upper Savannah will be adjusted to the length of the contract.

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 but before 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 high education providers. It builds community support for job seekers. Upper Savannah has a close connection to economic development and community-based organizations.

#### **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.

#### E. An Overview of the SC Works System

The SC Works Center (also known as a One-Stop or an American Job Center) 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 71)
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 SC Works Center Hours of Operation are set by the WorkLink 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 SC Works Centers also periodically close 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 staff be present at the Comprehensive five days a week, at Laurens and Newberry at least two. The remaining counties should be visited 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	SC Works Greenwood Located in the Brewer Community Complex 927 E. Cambridge Ave. Greenwood SC 29646 Phone: (864) 229-8872 Hours: Monday-Friday (8:30am-5:00pm) Closed from 12:00pm-1:00pm daily
Satellites	SC Works Abbeville Located inside Abbeville Administrative Complex 903 W. Greenwood St. Abbeville, SC 29620 Phone: (864) 366-6690 ext. 2291 Hours: Tuesdays (9:00am-4:00pm) Closed from 12:00pm-1:00pm
	SC Works Edgefield Located at the rear of Edgefield Co. Health Department 21 Star Road Edgefield, SC 29824 Phone: (803) 636-5509 Hours: Tuesdays (9:00am-4:00pm) Closed from 12:00pm-1:00pm
	SC Works Laurens Located beside Laurens Middle School 1029 W. Main Street Laurens, SC 29325 Phone: (864) 681-1605 Hours: Monday-Thursday (9:00am-5:00pm) Closed from 12:00pm-1:00pm daily
	SC Works McCormick Located next door to Town Hall 109 W. Augusta St. McCormick, SC 29835 Phone: (864) 852-3649 Hours: Mondays (9:00am-4:00pm)



	Closed from 12:00pm-1:00pm
	SC Works Newberry Located beside Piedmont Technical College- Newberry Campus 1840 Wilson Road Newberry, SC 29108 Phone: (803) 276-2110 Hours: Monday-Thursday (9:00am-5:00pm) 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

### **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.

### **Adult and Dislocated Worker Services**

Workforce services for eligible adults are available through one of the six core programs authorized by Workforce Innovation and Opportunity Act (WIOA). The WIOA Title I-B Adult program serves individuals and helps employers meet their workforce needs. It enables workers to obtain good jobs by providing them with job search assistance and training opportunities.

WIOA establishes a priority requirement with respect to funds allocated to a local area for adult employment and training activities. SC Works Center staff, when using WIOA Adult funds to provide individualized career services and training services, must give priority to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. Under WIOA, priority must be implemented for adult funds regardless of the amount of funds available to provide services in the local area. In addition, veterans receive priority of service in all DOL-funded employment programs.

The Dislocated Worker program is designed to help workers get back to work as quickly as possible and overcome barriers to employment. When individuals become dislocated workers as a result of job loss, mass layoffs, global trade dynamics, or transitions in economic sectors, the Dislocated Worker program provides services to assist them in re-entering the workforce. Services for dislocated workers are integrated and

provided through the SC Works Centers and include workforce education, training, and employment programs designed to assist displaced workers.

### **Career Services**

WIOA authorizes career services for adults and dislocated workers. There are three types of career services: basic career services, individualized career services, and follow-up services. The provision of individualized career services must be based on the employment needs of the individual as determined jointly by the individual and the case manager and may be identified through an individual employment plan (IEP). Career Services are defined in 20 CFR 678.430, and rules governing their provision to adults and dislocated workers are discussed in 20 CFR 680.100 through 195.

**Training Services.** Training services can be critical to the employment success of many adults and dislocated workers. Training services are governed by sections 20 CFR 680.200 through .230 and 20 CFR 680.300 through .350 of the WIOA Final Rule. WIOA case managers may determine training services are appropriate, regardless of whether the individual has received basic or individualized career services first, and there is no sequence of service requirement.

Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract discussed in Section 8 of TEGL 19-16. Except in certain instances listed in WIOA sec. 122(h) and 20 CFR sec. 680.320, training services must be provided by an Eligible Training Provider (ETP) in accordance with WIOA sec. 122(d). Training is available through a State Eligible Training Provider and Program List (ETPL), comprised of entities determined eligible to receive funds through WIOA title I, subtitle B, according to the Governor's eligibility criteria and procedure. Bidders can visit <https://scpath.org> for more information on South Carolina's ETPL.

### **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.

	<b>WorkLink</b>		<b>Upper Savannah</b>	
<b>PY22</b>	<b>Adult</b>	<b>Dislocated Worker</b>	<b>Adult</b>	<b>Dislocated Worker</b>
Employment 2 <sup>nd</sup> Qtr after Exit	81.1	83.3	77.8%	80.1%
Employment 4 <sup>th</sup> Qtr after Exit	81.8	83.4	74.0%	84.5%
Median Earnings 2 <sup>nd</sup> Quarter after Exit	\$6,200	\$7,935	\$5,800	\$7,995

Credential Attainment within 4 Qtrs after Exit	73.8	67.1	66%	63.1%
Measurable Skills Gains	55.2	60.2	55.2%	57.1%

\*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. Procurement**

WorkLink conducts all procurements in a manner providing full and open competition as required under 2 CFR 200, other federal and state laws and regulations, and the SC Appalachian Council of Governments (SCACOG) Procurement Policy. This RFP is also subject to the Upper Savannah procurement policy.

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.

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.

### **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](mailto: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 <i>Questions posted on WorkLink WDB website within 48 hours</i>	December 15, 2022	11:00AM
<b>Proposal Packages Due &amp; Technical Review</b> (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 financial capability to successfully provide the services identified in this RFP.

Entities eligible to receive funds made available to operate an Adult/DW program are as follows:

- Public;
- Private for-profit businesses;

- Private not-for-profit organizations (including faith and community-based organizations);
- Labor groups; or
- Governmental entities (including the public school system, community colleges, local government, and other public sector organizations).

**Additional Qualifications:**

1. Organizations submitting proposals must have the ability to receive, disburse, and account for funds in accordance with generally accepted accounting practices; and be licensed or otherwise authorized to do business in the state of South Carolina.
  - 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.
  - 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. No entity may compete for funds if:
  - The entity has been debarred or suspended or otherwise determined to be ineligible to receive Federal funds by an action of any governmental agency;
  - The entity has not complied with an official order to repay disallowed costs incurred during its contract;
  - The individual or entity or its parent organization has filed for bankruptcy during the past 5 years;
  - The individual or entity has been convicted of a public entity crime pursuant to statutes; or
  - The individual or entity developed or drafted work requirements for this RFP.
3. 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 provided WIOA Adult and Dislocated Worker Services for more than two years OR can demonstrate successful performance in operating similar employment and training focused programs for more than two years);*
4. 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 bidder 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 11:00AM 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 (electronic and hard copies) 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. Hardcopies will be returned unopened to the sender. The RFP and related documents can be downloaded from the WorkLink website at: <https://worklinkweb.com/en/about-worklink/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, 1:00PM 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 Point of Contact will schedule these presentations if required. January 26, 2023 has been reserved for this purpose.

### **PART 3: SCOPE OF SERVICES AND OPERATIONS**

#### **A. Required Title I-B WIOA Adult & Dislocated Worker Services**

Under this RFP, the selected provider will be required to carry out the following Title I-B WIOA Adult & Dislocated Worker Services:

##### *1. Basic Career Services*

All of the basic career services described in WIOA secs. 134(c)(2)(A)(i)-(xi) must be provided in each local area through the one-stop delivery system. Generally, these services involve less staff time and involvement. These services may be provided by both the Adult and Dislocated Worker programs as well as by the SC Department of Employment and Workforce employment services staff. The WIOA program staff funded under this RFP will be expected to collaborate with the WorkLink and/or Upper Savannah SC Works Operator and network of partners to integrate and coordinate basic career services for common customers.

- a. **WIOA Program Eligibility** - Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs.

WIOA Program staff are responsible for enrollment of adult and dislocated worker participants in accordance with eligibility requirements.

##### *General WIOA Title I-B Eligibility Requirements*

ALL adults, dislocated workers, and youth must be:

- a U.S. citizen or eligible to work in the United States; and
- meet Military Selective Service registration requirements (male only).

*Adult Program: Specific WIOA Title I-B Eligibility Requirements*

- Applicants must be 18 years and older
- Meet Priority of Service Requirements: The Priority of Service policy for Adults in South Carolina states that 75% or more of those served in the adult funding stream must be low income, public assistance recipients, or basic skills deficient. The remaining 25% is open to the general population that are not low income, public assistance recipients, or basic skills deficient. Within each category, priority will be given first to Veterans and qualified spouses and then to non-Veterans.
  - Priority 1 - Veterans who are public assistance recipients, low-income adults, or who are basic skills deficient.
  - Priority 2 – Non-veterans who are public assistance recipients, low-income adults, or who are basic skills deficient.
  - Priority 3 - Veterans who are not public assistance recipients, low-income adults, or who are basic skills deficient.
  - Priority 4 – Non-veterans who are not public assistance recipients, low-income adults, or who are basic skills deficient.

*Dislocated Worker Program: Specific WIOA Title I-B Eligibility Requirements*

- Applicants must meet the definition of Dislocated Worker (WIOA sec. 3(15)).
- There is no age criterion for Dislocated Worker programs.

*Youth Eligibility Requirements: Specific WIOA Title I-B Eligibility Requirements*

- Must meet the definition of Out-of-School Youth or an In-School Youth. WIOA Section 129(a)(1)

WorkLink's Youth program serves only Out-of-School Youth currently.

WIOA Applicants should be made aware of all WIOA services and funding for which they qualify. Therefore, if an individual is determined eligible for Youth WIOA services, the WIOA applicant should be given information regarding the Youth program and/or a referral to the WIOA Youth Services provider for enrollment.

- The WorkLink WDB does not currently dual enroll in the Adult and Youth programs. If dual enrollment were to be approved by the WorkLink Board during the contract year (or applicable extensions) under this proposal, the successful bidder will be notified and expected to collaborate with the Youth Service Provider to maximize the use of funds.
- The Upper Savannah WDB allows for enrollment of In-School-Youth provided expenditures for In-School youth are lower than 25%. Co-enrollment is allowed, and in some cases, encouraged so that young participants can benefit from a wider range of services.



A completed eligibility determination application may be considered for enrollment for no more than 90 days. When applicants do not meet eligibility requirements for any WIOA-funded services, program staff are responsible for referring them to alternate sources of funding through partner agencies.

- b. **Outreach, Intake, and Orientation** - Orientation intended to provide information on services available through the SC Works Centers.

WIOA program staff must provide the WIOA portion of the Orientation presentations and should be coordinated with the SC Works Operator.

*Individuals with Barriers to Employment*

Services provided to adults and dislocated workers under title I of WIOA can be a pathway to self-sufficiency and to maintain and build skills to remain self-sufficient. Across all titles, WIOA focuses on serving “individuals with barriers to employment”, defined in WIOA section 3(24) and seeks to ensure access to quality services for these populations. The WIOA Final Rules discuss priority and special populations for the Adult and Dislocated Worker programs at 20 CFR 680.600 through .660.

- i. Displaced homemakers (as defined in WIOA sec. 3(16))
- ii. Low-income individuals (as defined in WIOA sec. 3(36))
- iii. Indians, Alaska Natives, and Native Hawaiians (as defined in WIOA sec. 166(b))
- iv. Individuals with disabilities, including youth who are individuals with disabilities (as defined in WIOA sec. 3(25) (includes individuals who are in receipt of Social Security Disability Insurance)
- v. Older individuals (age 55 and older) (as defined in WIOA sec. 3(39))
- vi. Ex-offenders (“offender” as defined in WIOA sec. 3(38))
- vii. Homeless individuals or homeless children and youths (see Attachment III)
- viii. Youth who are in or have aged out of the foster care system
- ix. Individuals who are: (1) English language learners (WIOA sec. 203(7)), (2) Individuals who have low levels of literacy (an individual is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, or in the individual’s family, or in society); and (3) Individuals facing substantial cultural barriers
- x. Eligible migrant and seasonal farmworkers (as defined in WIOA sec. 167(i) (1-3))
- xi. Individuals within two years of exhausting lifetime TANF eligibility
- xii. Single parents (including single pregnant women)
- xiii. Long-term unemployed individuals (unemployed for 27 or more consecutive weeks)
- xiv. Such other groups as the Governor involved determines to have barriers to employment

Under this RFP, program staff are to conduct outreach to priority populations and low-income communities.

- c. **Initial Assessment** - The assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs.
- d. **Labor Exchange** - Job search and placement assistance, including the provision of information on in-demand industry sectors and occupations, and on nontraditional employment. WIOA program staff will coordinate appropriate services with employment services staff.
- e. **Referrals to Partners** – The provision of referrals to and coordination of activities with other programs and services, including those within the SC Works system and, when appropriate, other workforce development programs.
- f. **Labor Market Information** – The provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, job vacancy listings in labor market areas, information on job skills necessary to obtain the vacant jobs listed, and information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- g. **Training Provider Performance and Cost Information** – The provision of performance information and program cost information on providers approved on South Carolina’s Eligible Training Provider List (<https://scpath.org>)
- h. **Supportive Services Information** - Information relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: 1) Child care; 2) child support; 3) medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; 4) benefits under SNAP; 5) assistance through the earned income tax credit; and 6) assistance under a State program for TANF, and other supportive services and transportation provided through that program.
- i. **Unemployment Insurance (UI) Information and Assistance** - Information and assistance regarding filing claims under UI programs, up to and including assisting individuals in filing a claim either on-site using staff who are properly trained in UI claims filing, and/or the acceptance of information necessary to file a claim. WIOA program staff will coordinate appropriate services with employment services staff.
- j. **Financial Aid Information** - Assistance in establishing eligibility for training providers offering financial aid assistance for training and education programs not provided under WIOA.

## 2. *Individualized Career Services*

Individualized career services must be made available if determined to be appropriate in order for an individual to obtain or retain employment. These services include the following:

- a. Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include the diagnostic testing, and use of other assessment tools, and/or in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals
- b. Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information about, the eligible training providers
- c. Group counseling
- d. Individual counseling
- e. Career planning
- f. Short-term pre-vocational services including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct services to prepare individuals for unsubsidized employment or training
- g. Internships and work experiences that are linked to careers
- h. Workforce preparation activities
- i. Financial literacy services as described in sec. 129(b)(2)(D) of WIOA
- j. Out-of-area job search assistance and relocation assistance
- k. English language acquisition and integrated education and training programs

Under this RFP, the WIOA program staff will be responsible for carrying out individualized career activities appropriate for eligible, enrolled participants.

Please note that this includes any participants enrolled for the purpose of participating in work-based learning opportunities funded through the One Stop Operator RFP. The selected bidder under this RFP will be required to coordinate service delivery strategies with the One Stop Operator to ensure participants are aware of WIOA funded work-based learning opportunities. The selected bidder will also be required to enroll eligible participants and ensure that they receive appropriate case management and supportive services throughout the work-based learning opportunity.

### 3. *Training Services*

Types of training services are listed in WIOA sec. 134(c)(3)(D). This list is not all-inclusive and additional training services may be provided. Under this RFP, the program staff will be responsible for determining the need for training and coordinating the following activities on behalf of participants:

- a. Occupational skills training, including training for nontraditional employment
- b. Programs that combine workplace training with related instruction, which may include cooperative education programs
- c. Training programs operated by the private sector
- d. Skills upgrading and retraining
- e. Entrepreneurial training

- f. Job readiness training provided in combination with services listed in paragraphs (a) through (h) of this section;
- g. Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with training services listed in paragraphs (a) through (g) of this section

#### *Determining Need for Training*

Under WIOA sec. 134(c)(3)(A) training services may be made available to employed and unemployed adults and dislocated workers who:

- a. After an interview, evaluation, or assessment, and career planning, are:
  - i. Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;
  - ii. In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment; AND
  - iii. Have the skills and qualifications to participate successfully in training services.
- b. Select a program of training services that is directly linked to the employment opportunities in the local area or the planning region, or in another area to which the individuals are willing to commute or relocate.
- c. Are unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds, Trade Adjustment Assistance (TAA), and Federal Pell Grants established under title IV of the Higher Education Act of 1965, or require WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants (provisions relating to fund coordination are found at WIOA sec. 134(c)(3)(B)); AND
- d. If training services are provided through the adult funding stream, are determined eligible in accordance with the State and local priority system in effect for adults under WIOA sec. 134(c)(3)(E).

#### *Individual Training Accounts (ITAs)*

Training services for eligible individuals are typically provided by training providers who receive payment for their services through an ITA. The ITA is a payment agreement established on behalf of a participant with a training provider. WIOA title I adult and dislocated workers purchase training services from State eligible training providers they select in consultation with the career planner, which includes discussion of program quality and performance information on the available eligible training providers. Payments from ITAs may be made in a variety of ways, including the electronic transfer of funds through financial institutions, vouchers, or other appropriate methods. Payments also may be made incrementally, for example, through payment of a portion of the costs at different points in the training course.

Under this RFP, the program staff will be responsible for coordinating services and payments with Training Providers utilizing ITAs, ensuring that WorkLink limitations have been met.

### *Targeted Training and Participant Funding Caps*

South Carolina has set ITA caps at \$14,000 per participant per lifetime.

WorkLink has further set ITA caps for training to \$5,000 per participant per program year, not to exceed \$10,000 per participant per lifetime. WorkLink has adopted the following industry clusters and one occupational exception.

- Administrative and Support and Waste Management and Remediation Services
- Construction
- Health Care and Social Assistance
- Manufacturing
- Professional, Scientific, and Technical Services
- Career exception: CDL training

Upper Savannah has adopted a sector strategy approach supporting occupations which support manufacturing and healthcare. Businesses in those industries hire workers for support roles in business, IT, logistics and construction and maintenance. Upper Savannah does not pay for stand-alone Certified Nursing Assistant training. Upper Savannah does not pay for cosmetology or barbering, massage therapy or graphic design. Courses exclusively for college transfer are not included. Upper Savannah has a training cap of \$10,000.

Utilizing WIOA funding, participants may choose a program of study from the South Carolina Eligible Training Provider List (<https://scpath.org>) that leads to in-demand occupations within one of these industries (or career exception) and results in a nationally recognized credential.

#### *4. Supportive Services*

Supportive services for adults and dislocated workers are services that are necessary to enable an individual to participate in activities authorized under WIOA sec. 134(c)(2) and (3). These services may include, but are not limited to, the following:

- a. Linkages to community services
- b. Assistance with transportation
- c. Assistance with childcare and dependent care
- d. Assistance with housing
- e. Needs-related payments, as described at §§ 680.930, 680.940, 680.950, 680.960, and 680.970
- f. Assistance with educational testing
- g. Reasonable accommodations for individuals with disabilities
- h. Legal aid services
- i. Referrals to health care

- j. Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear
- k. Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes
- l. Payments and fees for employment and training-related applications, tests, and certifications.

Supportive services may be provided only when they are necessary to enable individuals to participate in career service or training activities. Therefore, the participant must be:

- Participating in career or training services as defined in WIOA secs. 134(c)(2) and (3); AND
- Unable to obtain supportive services through other programs providing such services.

Needs-related payments provide financial assistance to participants for the purpose of enabling them to participate in training and are a supportive service authorized by WIOA sec. 134(d)(3). Unlike other supportive services, in order to qualify for needs-related payments a participant must be enrolled in training.

WorkLink has set the maximum amount of supportive services to \$3,000 per program year per participant. Upper Savannah has limits tied to the type of supportive services and duration of training. It is willing to adjust payment amounts/processes to WorkLink for ease of administration.

Under this RFP, the program staff will be responsible for coordinating services and supportive service payments with vendors and participants, ensuring that WorkLink limitations have been met.

## 5. *Follow-Up*

Follow-up services must be provided, as appropriate, including Counseling regarding the workplace, for participants in adult or dislocated worker workforce development activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment.

## 6. *Additional Requirements and Expectations*

### a. *Coordination with the SC Works Operator and Partners*

Program staff are expected to collaborate with the SC Works Operator and the network of SC Works partners on behalf of mutual participants and in recruitment efforts.

The 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. Program Staff are expected to collaborate and coordinate outreach for the WIOA programs and on behalf of the SC Works Centers in conjunction with the Operator.

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. Program Staff are expected to collaborate and contribute to these initiatives.

*b. Business Services Collaboration*

Program Staff are expected to collaborate with the Business Services staff to place participants in work-based learning opportunities and in permanent jobs, including Wagner-Peyser staff and in coordination with staff that manage On-the-Job Training, Work Experiences, Registered Apprenticeships, and similar work-based learning opportunities.

*c. Rapid Response*

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. Program staff will be expected to represent WIOA services on the Rapid Response team and coordinate appropriate WIOA services on behalf of the affected workers and employer.

*d. Enrollment*

WorkLink prioritizes enrollments for the WorkLink region to the following: those that currently live or work in the region, and those that last worked in the region. Exceptions have been made for (1) those individuals currently attending school within the WorkLink service area, (2) live closer to a WorkLink SC Works Center than their counties' closest SC Works Center, and (3) those that are relocating to the area after being discharged from the military or after being released from prison. Currently Upper Savannah serves adults who reside in an Upper Savannah County and dislocated workers who either live or were dislocated from an employer in an Upper Savannah County.

*e. Co-enrollment with Trade*

The Trade Adjustment Act administered by SC Department of Employment and Workforce is a partner in the SC Works System. Requirements regarding services available and co-enrollment with

WIOA change from time to time. Program staff will be required to follow DOL, State, and local guidance regarding co-enrollment of Trade eligible participants.

*f. Case Management*

Case management is the provision of a client-centered approach in the delivery of services, designed:

- To prepare and coordinate comprehensive employment plans, such as service strategies, for participants to ensure access to necessary WIOA activities and supportive services, using, where feasible, computer-based technologies; and
- To provide job and career counseling during program participation and after job placement.

Program staff should know the name, face, family, and life situation of each participant. They should have a detailed and working knowledge of other community services, community resources, and cultivate a wide network of contacts. Where progress is slow or in reverse, case managers should be pro-active in identifying the problem and solving it before the participant quits without achieving a recordable positive outcome.

*g. Soft Skills/Job Retention*

Program staff are expected to evaluate and train job seekers on how to present themselves in a professional manner before and after they are hired. Therefore, an emphasis on pre-hire soft skills (centered on appropriate dress, interviewing skills, job application completion, resume writing, and others as deemed appropriate) and on post-hire soft skills (centered on personal attributes needed to succeed in the workplace, such as communication skills, critical thinking, leadership, positive attitude, teamwork, conflict management, and work ethic, among others) are necessary. Employers want employees who are able to effectively interact with others.

*h. File Maintenance and Documentation*

A case file shall be maintained for each eligibility determination application (assigned a unique identification number). Appropriate documentation of all activities must be made available to WIOA monitors/auditors. WIOA Participant records and fiscal documents should be kept for a minimum of 5 years. Program staff are expected to enter and maintain appropriate case notes and WIOA program activity codes in the SCWOS System in a timely manner, including recording accurate ITA obligations, vouchers, payments, and refunds. **Beginning July 1, 2023, WorkLink will require all WIOA-related documentation to be uploaded in SCWOS.** (This includes all items that would normally be kept in a hard copy of the participant's file.) Upper Savannah requires all new client information to be uploaded in SCWOS.



*i. Job Placement*

Program staff are expected to provide job leads, specific job development, and job matching to participants seeking employment.

*j. Program/Case Closure*

Program staff will be expected to close individual cases in the SCWOS System in a timely manner when no further services are planned or identified on the IEP or expected as outlined in the Training & Education Guidance Letter # 17-05 (TEGL 17-05).

*k. Collaboration on Grants*

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.

If 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.

There is an opportunity for the provider to participate in a CAREER National Dislocated Worker Grant. The grant expires August 19, 2023 but has the possibility of being extended a year. Approximately \$350,000 will be available to place 35 clients in OJT. Clients may be co-enrolled in contracts established through this procurement. Because the grant has such a short duration, a budget is not sought. If it is mutually acceptable the winning provider will be given a subagreement to assist with this project. The staff compensation and associated indirect/profit will be at the same rate as what is set in this procurement.

Also, this procurement does not include Youth Services. Upper Savannah is separately procuring youth services. Offerors who anticipate operating Youth as well as the Adult/Dislocated Worker career services may propose to share staff. If a provider does not get all of the contracts for which they apply for a budget revision will be allowed.

**B. Deliverables**

The Successful bidder will be required to provide the following deliverables:

1. At a minimum, meets all performance measures (WIOA measures, Business Plan, WDB goals, customer satisfaction, etc.)
2. A minimum of three success stories per quarter submitted to the WDB Board

3. Establishes a systematic way of providing and delivering soft skills and job retention instruction to WIOA participants
4. Utilizes Career Pathway models in guiding participants into training
5. Internal monitoring reports of case files
6. Sub-recipient monitoring reports if applicable
7. At a minimum, meet negotiated successful bidder goals for WIOA program participation (i.e., expenditure levels, enrollments, training levels, etc.)
8. Develop and execute an Outreach plan for the WIOA program
9. Attend Board meetings and committee meetings prepared to present results or progress of goals identified in RFP response
10. Develop a report and/or dashboard of RFP deliverables and goals outlined in the RFP response to present at Board and Committee meetings
11. Maximizes direct participant costs, minimizes salaries and overhead while maintaining quality services
12. Tracks all ITAs by obligation, accrual, and expenditure in real-time
13. Expends a minimum of 95% of their budget for WorkLink and 90% of their budget for Upper Savannah.
14. WorkLink requirement: Expends a minimum of 40% of total expenditures on direct participant costs (training, supportive services). Upper Savannah requirement: Expends at least 38% of total expenditures on direct participant costs.
15. Other goals that support the Scope of Work outlined in this RFP

## **Reports**

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

The selected bidder 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. Attach a sample report/dashboard to the RFP proposal that would be representative of a project similar to this.

*Financial Reports:* WorkLink Financial reports will be prepared and submitted to the WDB Office by the 10th day of the following month. Upper Savannah financial reports are due by the 8<sup>th</sup> day of the following month in order to assure prompt payment. Financial Reports include:

- Monthly request for payment
- Financial Status Report –Supplemental form
- General Ledger Detail
- Back-up documentation
- YTD Expenditure Reports
- Contract Obligations by Fund Stream

- ITA Obligations (and encumbrances) by Fund Stream and by Program Year

### C. 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 Plan: <https://worklinkweb.com/en/publications/>
- PY2022 WorkLink MOU: <https://worklinkweb.com/en/publications/partner-meetings-and-information/>
- SC State Instruction Letters: <https://scworks.org/workforce-system/policies-and-guidance>
  - 16-12, "Facility and Program Accessibility Under WIOA"
  - 20-02, "Soft Skills Instruction and Activity Code"
  - 20-11, "Follow-up Services for WIOA Title I Program Participants"
  - 20-14, "Required Use of SCWOS for Referrals"
  - 20-15, "Participant Eligibility for WIOA Title I Programs"
  - 21-01, "Advanced Individual Fund Tracking Module"
  - 21-03, "TAA and WIOA Dislocated Worker Program Co-enrollment Policy"
  - 21-04, "Required Use of SCWOS Greeter in SC Works Centers"
  - 21-06, "SC Works Certification Standards"
- SC 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
  - 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 (Geographic Solutions) – <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 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
- TEGL 19-16: Guidance on Services provided through the Adult and Dislocated Worker Programs under the Workforce Innovation and Opportunity Act (WIOA) and the Wagner-Peyser Act Employment Service (ES), as amended by title III of WIOA, and for Implementation of the WIOA Final Rules
- The Workforce Innovation and Opportunity Act (WIOA) of 2014 (Public Law (Pub. L. 113-128)) Title I and III, enacted July 22, 2014
- WIOA Regulations at 20 CFR parts 651, 652, 680, and 682
- Title 38 United States Code (38 U.S.C. 4213)
- Definition of Terms – reference WIOA sec. 3 and 20 CFR 675.300 for a full list of definitions

#### **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.

- 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 (if applicable)
- Subcontractor Description (if applicable)
  - 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 (if applicable) – 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 a notification of the release of the WorkLink & Upper Savannah RFP 22-WIOA-02, but elects not to submit a proposal, 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.

#### **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 copy 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 02, ABC Co., part 1 of 4 parts.")

For those also submitting a redacted copy, please clearly mark the redacted documents with either "R" or "Redacted." (Example: "RFP 22 WIOA 02, ABC Co., part 1 of 4 parts, 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-02 Adult/DW Program Services, Final Proposal Submission, ABC Co.
- If the final submission is to be submitted in multiple emails, please include the following in the email subject: "Email # of # Emails."  
Example: 22-WIOA-02 Adult/DW Program Services 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 RFP Point of Contact 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 02. 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 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 a separate USB flash drive labeled using the original naming convention with the word “Redacted” added to the label, or include the redacted documents (clearly labeled) on the USB flash drive marked “Original.”

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 thirteen (13) 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. 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. (Example: a sealed envelope

containing the flash drive attached to the bound volume; a clear, resealable pouch included in the three-ring binder; or similar.)

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.

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

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

ABC, Inc.  
100 My Road  
My Town, State 55555  
RFP #22-WIOA-02, January 9, 2023  
Adult/DW Program Services

**DUE DATE:** **January 9, 2023, 1:00PM (EST)** (applies to hard copies and electronic copies)

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: WorkLink follows Pickens County's closing schedule, <https://www.co.pickens.sc.us/>.

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 on which normal government processes 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 provider of Adult/DW services if awarded a contract and how it will specifically benefit the WorkLink and/or Upper Savannah regions.
- Describe your organization's vision of the Adult/DW program for the WorkLink and/or Upper Savannah regions. Include target customers, key locations, services, associated service strategies, and SMART goals. Complete the Master Summary of Goals – Form D and summarize your primary goals here.
- Clearly identify the number of participants to be enrolled into the WIOA Adult/Dislocated Worker program, and if applicable, the number of those that will be from priority or special populations.
- Clearly identify the number of participants to be enrolled into WIOA funded training services and supportive services.
- Clearly state your case management to participant caseload ratio.
- 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 workforce employment and training program 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 an employment and training program.

- Give a brief summary of a similar project that you have implemented along with benchmarks that you have achieved. Describe your experience implementing and managing an employment and training program. 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.
- Give examples of projects that you have worked on that have been innovative along with outcomes. If there are no examples of innovation, provide examples of projects that you have implemented best practices and how it impacted outcomes.
- Describe your experience in managing and accounting for multiple federal, state, and local funding sources in accordance with Generally Accepted Accounting Principles (GAAP). Provide a summary of federal dollars that your organization is currently managing.
- Describe your experience administering and tracking ITAs, Supportive Services, and other associated participant costs from initial obligation to voucher/invoice issuance to final payment. Include your process for following up on outstanding vouchers or invoices that have pending or missed deadlines. Provide a sample report that might be used to show ITA obligations, vouchers or invoices that are pending payment, cumulative payments, and remaining balances against budgeted line items.

**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 the raise or bonus determined, and how it's implemented.
  - Describe benefit packages that will be made available to employees, and when they will be eligible to receive those benefits. How are the various rates calculated for each benefit, including health insurance, unemployment insurance, workers compensation, retirement, etc.?
  - Provide an organizational chart inclusive of all executive staff to frontline staff.

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. 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 program 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 specific area. 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 Adult/DW programs 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.
- 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 delivery of Program Services 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's and/or Upper Savannah's Local Plan, One Stop Certification Standards, and/or Memorandum of Understanding.
- 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 evidenced based best practices or innovative ideas in your responses.
- Include how you will use technology to deliver services.
- Include how you will leverage partnerships and resources.
- Include how you will research and collect relevant data from reputable sources to drive positive changes in the delivery of WIOA Program Services in the WorkLink and/or Upper Savannah region.
- 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.

### **B. Customer Flow Chart**

Provide a flow chart (from the customer's perspective) of how you envision WIOA program services to be delivered. At a minimum, the following must be included:

- WIOA Eligibility Determination
- Enrollment
- Assessment
- Individual Employment Plan (IEP)
- Job Placement
- Follow-up Services

The bidder should incorporate into their customer flow chart any **key** services (and strategies) that will be required of or provided to **all** customers within the following categories:

- Basic Career Services
- Individualized Career Services
- Training Services

Bidders may add to these categories as appropriate. The categories or services to be addressed are not required to be offered in any particular order outside of the WIOA rules and regulations and guidance provided by State policies.

### **C. Program Services & Strategies**

Using the customer flow chart, describe in further detail your program design, elaborating on service strategies. Be specific, giving as complete a picture of the services participants will be able to access as possible. (Do not just address the bullet points here.)

- Include in your response each basic career service, individualized career service, training service, job placement service, supportive service, and follow-up service that will be key to your design.
- Include strategies you will use to deliver these services and any key locations, assessments, software, tools, and resources. Include which services will be offered in-person by location, remotely, or a combination of both. Denote which services will be required of all participants vs. on an as needed basis.
- For those career services not key to the successful delivery of your program, describe how those services will be addressed either directly (such as on an ad hoc basis) or indirectly through partners and how you envision them integrating with your program design. Include key partnerships, describing the roles both parties will fill and the division of responsibilities. Include which services will be offered in-person, remotely, or a combination of both.



- Include what role the One Stop Operator will have in the program design and service delivery. Expound on how you will be part of the SC Works System as a whole.
- Include how you ensured your program design was customer-focused and how it will achieve WIOA performance measures.
- Describe your target customers, including priority and special populations that you believe are key to the WorkLink and/or Upper Savannah communities. Include how you will ensure all WIOA program information and services are non-discriminatory and accessible, including those that speak languages other than English and providing accommodations for participants with disabilities.
- Provide a SWOT analysis of your program design, including specifics of how you will address weaknesses and threats.

#### **D. 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.

#### **E. Case Management**

Describe your case management philosophy, and how it leads to the goal of self-sufficient employment for participants. Include how you will:

- Participate in Rapid Response events and handle WIOA intake for mass layoffs.
- Include career pathways and LMI data in everyday case management.
- Determine basic skills deficiency for participant eligibility.
- Track priority of service for adult funded participants.
- Determine need for career services, training services, and supportive services.
- Determine co-enrollment and the process that will be used to co-case manage with other partners and/or programs.
- Accurately track and follow-up on the referrals both incoming from and outgoing to partner organizations.
- Address soft skills and job retention skills with participants.
- Ensure customer choice.
- Work with participants to find and/or be placed in employment. Include how you will work with work-based learning programs, such as apprenticeships, OJT, internships, work experiences, customized trainings, etc.
- Determine when a case should be closed.
- Conduct follow-up for the required four quarters under WIOA performance measures. (Be specific.)
- Track customer satisfaction, manage difficult or angry customers, and address complaints.
- Manage files and appropriate documentation. Include your case note expectations.

Clearly state your case manager to participant ratio (provide a range for caseload levels) and how you will manage those caseloads. Caseloads should include the number of cases regardless of status (active or follow-up).

- Describe your rationale for this case manager to caseload ratio, including an estimated breakdown of staff time during a specified timeframe. (For example purposes only, each month a case manager will spend approximately 10% of their time on outreach activities, 75% on direct client services, 10% on data entry, and 5% on staff training.)
- Describe whether case management will be provided from intake to follow-up or through a hand-off system. Include who will be responsible for which services and how files will be tracked.
- Describe how you will maintain those caseloads and manage any caseloads that are too small or too large.
- Describe your enrollment goals and your methodology for how you arrived at this number.
- Describe how many participants you anticipate training (including supportive services) and your methodology for how you arrived at this number.
- Confirm your commitment to enroll, case manage, and administer supportive services on behalf of eligible participants that plan to participate in work-based learning opportunities under the One Stop Operator RFP.

#### **F. Outreach & Recruitment Plan**

- Describe how you will conduct outreach in the WorkLink and/or Upper Savannah area, promoting the WIOA Adult/Dislocated Worker program. Give a timeline and detailed explanation of what methods would be used.
- 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 Upper Savannah regions, utilizing the priority and special populations list to formulate your response (see 20 CFR 680.600 through .660).
- Describe what relationships, partnerships, and community group organizations are essential to your outreach plan.
- Describe what innovative outreach methods will be used in the community to promote awareness of WIOA Program services.

### **PART 6: BUDGET & BUDGET NARRATIVE INSTRUCTIONS**

#### **A. Budget**

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

All costs related to the program activities described in the program design must be included on the Budget Forms. 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:** \$600,000 under this RFP. (Adult and Dislocated Worker Funding.)

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 area will have the opportunity to begin their contract on June 1, 2023.

**Upper Savannah:** \$654,201 under this RFP. (Adult and Dislocated Worker 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 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:

40% or more of requested funds should be allocated to participant costs. Participants costs are line items reflected in the Participant Related Costs worksheet.

#### Upper Savannah Budget Requirements and Availability of IT for start-up

At least 38% of requested funds should be allocated to direct participant costs. In addition, Upper Savannah is reserving up to \$20,000 of Adult/Dislocated Worker Resiliency Funding to pay for laptops, scanners, and other IT needs for staff startup. Do not include such costs in the budget (unless it is anticipated that it will be more than \$20,000 and the balance is requested.)

**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 the WDB funding the request.* 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.

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 specified region the staff person is assigned to;

- *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. **Classroom Training Costs:** Individual Training Account (ITA) Costs directly related to individual participants tuition and fees incurred to achieve program objectives. Breakout separately High School Diploma and Basic Skills related training, and pre-requisite training costs for the ITA line item. Include any other types of classroom training costs not otherwise included.

**Classroom Training Budget Narrative:** As applicable, for each item list the unit cost for each item x the number of instances each participant will utilize the service/activity x the total number of participants.

4. **Supportive Service Costs:** General costs to support WIOA individual participants while in a training activity, including transportation, childcare/dependent care, medical related expenses, legal aid services, classroom training related supplies and materials, occupational related exams/fees, work-based learning training related\*, Needs-Based Payments, and other supportive services not otherwise listed above.

*\*The Business Services position is being procured separately. Business Services will be able to provide OJT, transitional jobs, work experience, limited internships, and similar work-based learning opportunities. The recipient of the grant award described under this RFP will be required to enroll referred eligible participants into the WIOA program and administer WBL supportive services in coordination with WBL activities administered through the Business Services grant award.*

**Supportive Services 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.

5. **Other Participant Related Costs:** Costs to support WIOA individual participants while in a training activity not other 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 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 customer enrollments by month should be included in the Client Flow chart tab along with anticipated Exits from the WIOA program. A total anticipated caseload will automatically populate. Historical data from PY2021 was included for planning purposes.

**Client Flow Narrative:** Enter your planned monthly enrollments and anticipated exits into the chart. Calculate your anticipated cost per participant and include it in your narrative. Explain how you arrived at your cost per participant. Use your anticipated caseload numbers to justify the number of case management staff positions. (WorkLink prefers caseloads to be between 100 and 125 active and follow-up participants per case manager at any given time. If your anticipated caseload per case manager does not align with WorkLink preferences, provide a justification.)

11. **Participant Cost Rate:** Calculate the proposed Participant Cost Rate divided by the total amount you are requesting in your proposal. Provide an explanation as to why it meets, falls short, or exceeds 40% of the total budget.

12. **Cost Per Participant:** Calculate 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. Upper Savannah’s policy specifies that if a member of the panel is also on the board of directors of an organization submitting a proposal, the member has a conflict.

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 Bidder's proposal match the goals of WIOA and the WDBs vision?
- 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 services to be provided and strategies that will be used to deliver the 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 - 25 Points**

Points will be given based on the proposer's ability to demonstrate it has the resources and expertise to operate a federally funded employment and training program 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 employment and training programs 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. If the bidder has not operated a WIOA program 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 employment and training programs?
- Does the proposer demonstrate through shared examples their ability to leverage partnerships and services to better serve customers?

#### *Financial and Administrative Capacity*

- Does the bidder have the administrative, fiscal, and reporting capacities to provide employment and training services 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 proposed employment and training program? 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 employment and training program as demonstrated by successful relationships, positive outcomes, clean monitoring, and acceptable levels of 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 an employment and training program that will meet employers' and job seekers needs, inclusive of priority populations. Points will be awarded to proposers whose program design includes (1) the development and

maintenance of an employment and training program, (2) improving customer service satisfaction, and (3) providing quality, data driven services for employers and job seekers.

#### 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?

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's and/or Upper Savannah's Local Plan, One Stop Certification Standards, and/or Memorandum of Understanding.
- 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 the mission and vision of the WorkLink and/or Upper Savannah WDBs? 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?

#### *Customer Flow Chart*

- Does the proposer include a visual flow chart showing a path for the customer to follow? Is the flow chart readable, understandable, and concise?
- Does it incorporate the following: WIOA Eligibility Determination, Enrollment, Assessment, Individual Employment Plan (IEP), Job Placement, and Follow-up Services?
- Does it include possible entry and exit points? Are there any basic career services that will be required prior to enrollment?
- Does it include any key case management appointments that address employment?
- Does it include specific soft skills and basic skills (including financial and digital literacy), at what points they will occur, and who will be providing those services?

- Does it include any additional basic career services, such as workshops or job clubs, or individualized career services, such as types of assessments and when those might occur?
- Does it include opportunities for types of training (both classroom and work-based learning opportunities)?
- Does it include follow-up services for four quarters? Are there basic career services that will be offered during follow-up?
- Does it include possible referral points prior to participation, while in the program, and during the follow-up period?
  - Does it include key partnerships with local organizations and any sub-tier agreements? Is it clear what their role will be in the program delivery and at what points the customer will engage with the partner or sub-tier agreement service provider?

### *Programs Services & Strategies*

Points will be awarded based on the proposer's ability to demonstrate a reasonable, executable program design and accompanying service delivery strategies that lead participants to self-sufficient employment and where possible, appropriate recognizable credentials and/or development of skills needed for finding and keeping a job. The program design and strategies proposed within the application indicate promising results based on sound research, demonstrated best practices, and appropriate funding.

- Does the narrative reflect the flowchart, including key markers in their flowchart from entry points to final follow-up services?
- Does the narrative give a complete description of the basic career services, individualized career services, and training services and strategies that were referenced in the flowchart? Are the strategies provided appropriate and indicate participants will be successful in finding and keeping self-sufficient employment and if attending training, completing their course of study or work-based learning opportunities, and attaining appropriate skills and/or credentials?
- Did the provider describe their target customers, specifically priority and special populations? Are the strategies and services here appropriate for all customers?
- Does the narrative address how program design is based was developed based on the identified customer(s)?
- Did the bidder describe how their program design is accessible to all customers and any accommodations they have already factored into their program design, either during the design phase or will be implemented during service delivery if requested?
- Does the narrative address how technology will be used to deliver services? Is appropriate internet based and downloadable software as well as other tools available either to participants or to staff to carry out career services and case management responsibilities?
- Does the narrative include evidence-based research and promising practices to support their vision described here? Do they include references to the research materials?

- Are proposed SMART goals included at appropriate points? Are they reasonable, achievable, and have a clear description of how they will support the goals of WIOA?
- Are key partnerships, sub-tier agreements, and WIOA and non-WIOA resources available during the participant's path described, including career services, job placement services, classroom training and supportive services, co-enrollment opportunities, work-based learning opportunities, and referrals? Does the provider specifically address how they will handle youth program referrals and work-based learning opportunity referrals to and from the WIOA Business Service position?
- Does the narrative include the One Stop Operator role in the design of their program?
- Does the narrative include a SWOT analysis and sufficiently address weaknesses or threats that they will monitor and address? Do they include reasonable action plans and goals to overcome and/or minimize impact those weaknesses and threats pose to the program design or proposer?

#### *Sub-contracts*

Points will be awarded based on the reasonableness of cost, the quantity and quality of services delivered, and outcomes proposed in the sub-tier agreement (or contract).

- Does the proposer include the MOA or contract in the exhibits?
- Is the budget associated with the contract complete and includes reasonable, allowable costs? Are profit margins within a reasonable amount?
- Does the contract include services to be delivered? Are these services for WIOA participants only and directly support the goals of the WIOA program? Do the proposed services appear to be sufficient to necessitate a sub-contract comparative to the cost?
- Does the contract appear to provide quality services? Is the contractor well-known, well-respected for their services? If not, does the contractor have a website that includes reviews of the services to be provided under this sub-tier agreement? If not, does the contractor provide references and contact information for other organizations that have purchased their services?
- Are there goals included? Are they achievable within the timeframe indicated in the contract? Do the goals allow for successful and unsuccessful completions?

#### *Case Management*

Points will be awarded based on the proposer's ability to provide quality case management that lead participants to self-sufficient employment and where possible, appropriate recognizable credentials and/or development of skills needed for finding and keeping a job. Case Management should be customer focused. Case Management must also be able to complete key deliverables and consistently meet recurring deadlines and requirements.

- Does the narrative include their case management philosophy? Does the description support a customer focused approach? Does it support listening and responding to customers? Does it



reflect a holistic approach, including how to address customer issues beyond employment and training?

- Does the narrative address how case managers will make self-sufficient employment a priority for each participant? Does it include career pathways and labor market information in everyday case management?
- Does the narrative include how they will manage WIOA intake for mass layoffs/Rapid Response events?
- Does the narrative include how they will determine basic skills deficiency for participant eligibility? Does it include key locations, assessments, and accounting for costs?
- Does the narrative include how they will track priority of service for adult funded participants?
- Does the narrative include how they will determine need for individualized career services, training services, and supportive services.
- Does the narrative include how they will determine co-enrollment and the process that will be used to co-case manage with other partners and/or programs? Is it well-thought out and manageable?
- Does the narrative include how they will accurately track and follow-up on the referrals both incoming from and outgoing to partner organizations? Is it well-thought out and manageable?
- Does the narrative include how they will address soft skills and job retention skills with participants? Are specific soft skills and job retention skills identified and do they include SMART goals?
- Does the narrative include how they will ensure customer choice?
- Does the narrative include how they will work with participants to find and/or be placed in employment? Do they specifically address how they will work with work-based learning programs, such as apprenticeships, OJTs, internships, work experiences, customized trainings, etc., specifically with the WIOA Business Services position(s)?
- Does the narrative include how they will determine when a case should be closed? Does their methodology support WIOA goals and reasonable expectations of participants?
- Does the narrative include how they will conduct follow-up for the required four quarters under WIOA performance measures? Do they have a variety of methods they will use to try to capture WIOA outcomes for the purpose of performance? Do they offer basic career services as needed?
- Does the narrative include how they will track customer satisfaction, manage difficult or angry customers, and address complaints? Do they indicate how they will use customer service satisfaction surveys and interviews to adapt program design and improve customer service?
- Does the narrative include how they will manage files and appropriate documentation? Does their file management process indicate their ability to safeguard their files and documentation?
- Do they include case note expectations? Are their case note expectations thorough and understandable? Does it protect personal identifying information, legal and medical information,

and other proprietary information, but they are still able to convey services needed, delivered, and appropriate outcomes?

*Using the Budget Worksheet – Form C for reference and the accompanying budget narrative.*

- Does the narrative describe the number of participants (active vs. follow-up) to case management ratio?
- Do they include an estimated breakdown of staff time for a specified time frame, which shows the approximate amount of time by activity: outreach, staff training, eligibility and enrollment, case management appointments, follow-up services, and general WIOA program related office work? Do they include other relevant activities they spend time on? Does the percentage of time add up to 100% of time dedicated to work to be performed under this grant?
- Do they specify if staff will offer “cradle to grave” services or hand-off processes?
- Do they describe how they will maintain those caseloads and manage any caseloads that are too small or too large?
- Do they describe their enrollment goals and methodology for how they arrived at this number. Do they include a cost per participant analysis?
- Do they describe how many participants they anticipate training (including supportive services) and their methodology for how they arrived at this number?
- Does the number of anticipated caseload numbers necessitate the number of staff and the budgeted amount for their salaries?

### **Innovation – 10 Points**

Points will be awarded based on the bidder’s ability to demonstrate effective use of innovative strategies for the delivery of workforce development services, and strategies proposed within the application are based on sound research (where possible), demonstrated best practices, and support workforce and economic development priorities for the WorkLink and Upper Savannah regions.

- Does the bidder 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?
- Are the innovative approaches described accompanied by research or supporting documentation? If not, are they reasonable and fit with the goals of the WorkLink and/or Upper Savannah WDB’s vision and mission?

### **Outreach – 20 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?
- Are at least 40% of funds directed to participant costs (training and supportive services)?
- 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 and Upper

Savannah procurement policies. The WorkLink WDB and Upper Savannah WDB will make the final decision on successful proposal(s).

## **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 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. Proposals selected for funding will be scored and ranked based upon the evaluation criteria outlined in the RFP. Priority may be given to those 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.

WorkLink and Upper Savannah staff will compile funding recommendations based upon the outcome of the Selection Committee and will forward recommendations to their respective 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 when scaled down to only one area.

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.

Each WDB contract amount 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 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). 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 the Upper Savannah WDB has the option to extend their 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 are 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 Upper Savannah have 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 appropriate 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:
  - Current fiscal statement and copy of last audit
  - Bonding agreement
  - Evidence of signatory authority (Form Attached)
  - Financial reporting signatory authority (Form Attached)
  - Copy of indirect cost plan and approval letter by cognizant agency
  - Suspension and debarment certification (Form Attached)
  - Staff cost allocation plan/rate for Adult Program/Youth Program (Form Attached)
  - Certification of drug free workplace (Form Attached)
  - Certification of lobbying activities (Form Attached)
  - 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.

13. 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.
14. 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.
15. 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 WorkLink WDB within fifteen (15) working days of the award announcements addressed to Melanie McLane, Board Chair (c/o: Trent Acker, SC Works WorkLink, 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 – Request for Compliance Documents