



**REQUEST FOR PROPOSAL  
FOR  
ONE-STOP OPERATOR – WORKFORCE DEVELOPMENT SERVICES  
RFP # 2016-01**

**ISSUE DATE:** January 14, 2016

**PROPOSALS DUE:** February 17, 2016 by 4:00 P.M.

**CONTACT:** Keantha Belton Moore, Director of Operational Excellence  
CareerSource Capital Region  
325 John Knox Road, Atrium Building – Suite 102  
Tallahassee, Florida 32303

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## I. INTRODUCTION AND RFP PURPOSE

The Big Bend Jobs & Education Council, Inc. d/b/a CareerSource Capital Region (CSCR) is issuing this Request for Proposal (RFP) to solicit qualified organizations with the expertise and capacity to manage the day-to-day operations of our multiple one-stop career centers and to design, administer and deliver the following workforce development services to our job seeker customers in Gadsden, Leon and Wakulla counties of Florida:

- Workforce Innovation and Opportunity Act (WIOA)
- Welfare Transition (WT)
- Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T)
- Wagner-Peyser (WP)
- Veteran Services
- Migrant and Seasonal Farmworker (MSFW)
- Trade Adjustment Assistance (TAA)
- Other special grant-funded programs/projects, as awarded

Note: The services provided to job seeker customers also serve to ensure that the needs of our business customers are met by aiding them with meeting their workforce and talent needs.

It is the Respondent's responsibility to be familiar with all laws, statutes, rules, regulations, policies and procedures that are applicable to the above-referenced services. Further, proposals shall sufficiently articulate the Respondent's plan of action to deliver the solicited services and demonstrate a successful performance track record of delivering the solicited (or comparable) services.

### A. Method of Solicitation

This Request for Proposal is a competitive solicitation method being used by CareerSource Capital Region to maximize the likelihood of selecting a high performing, extremely competent provider of workforce development services and operator of our multiple career centers in Gadsden, Leon and Wakulla counties.

Notice of this RFP will be published in a major newspaper in the CSCR operating area and will also be distributed via email to organizations on the CSCR Bidder's List. Upon its release, the RFP, and all accompanying attachments, will be posted on CSCR's website: [www.careersourcecapitalregion.com](http://www.careersourcecapitalregion.com).

### B. Eligible Respondents

Any non-profit, for-profit, educational or public entity/organization properly organized in accordance with applicable federal, state or local laws is eligible to submit a proposal. To be eligible, Respondents must be authorized to do business in Florida and must have been in business for at least three (3) years prior to the point the proposal is submitted. Minority and women-owned and operated businesses are encouraged to submit a proposal.

No entity may compete for funds if: (1) the entity has been debarred or suspended or

otherwise determined to be ineligible to receive federal funds by an action of any governmental agency; (2) the entity's previous contract(s) with CareerSource Capital Region have been terminated for cause; (3) the entity has not complied with an official order to repay disallowed costs incurred during its conduct of programs or services; or (4) the entity's name appears on the convicted vendor list.

Respondents shall have direct experience with, and extensive knowledge of, the federal workforce investment system and the services and programs associated therewith. Further, Respondents shall document an in-depth knowledge of the fiscal, administrative and programmatic requirements of the multiple funding streams utilized by CSCR.

### C. Contract Term and Amount

It is the intent of CSCR to award a single contract for the services identified herein.

The expected contract term under this solicitation will be from July 1, 2016 through June 30, 2017, provided that measurable outcomes are successfully achieved and that sufficient funds for the contract term remain available. CSCR will have the option to renew the contract for up to three (3) additional one-year periods with Board approval as follows:

- Optional Renewal One – July 1, 2017 to June 30, 2018
- Optional Renewal Two – July 1, 2018 to June 30, 2019
- Optional Renewal Three – July 1, 2019 to June 30, 2020

Note: the option to renew is not guaranteed and the initial award of the initial contract does not imply an exercise of the option to renew.

Funding awarded under this RFP is not expected to exceed \$3,000,000. Note: This amount is provided as a planning figure only and does not commit CareerSource Capital Region to award a contract for this amount. The Respondent is responsible for proposing a reasonable total cost for delivering the services described in this RFP. Funding during the contract period may be adjusted due to changes in funding received.

Funding for this solicitation comes from the following sources:

- WIOA Adult
- WIOA Dislocated Worker
- WIOA Youth
- Temporary Assistance for Needy Families (TANF) – for the WT program
- Supplemental Nutrition Assistance Program (SNAP)
- Reemployment Assistance
- Wagner-Peyser, as available

Certain workforce development services are integrated into the framework of the one-stop delivery system and are provided by other funding sources managed by CSCR (WP, Veteran Services, MSFW and TAA). Staff from these other funding sources will be made available on a full-time basis and will be placed under the functional supervision of the Contractor.

**D. Contract Type**

CSCR contemplates payment under a cost-reimbursement, performance-based contract that will be based upon actual costs and performance delivery outcomes. The expected performance delivery outcomes for CareerSource Capital Region will be linked to the federal common measures, job placements, state performance criteria, quality assurance error rate, customer engagement and follow-up, and other criteria as determined and negotiated between CSCR and the Contractor.

For the purposes of responding to this RFP, Respondents should develop a line-item budget showing all expected costs associated with delivering the proposed services and a performance payment proposal showing the proposed amount of performance revenue (incentives).

Additionally, CSCR may elect to provide a contract modification that allows for the attainment of incentive funding provided that CSCR is awarded incentive funding from CareerSource Florida, Inc. through the achievement of performance metrics identified in the state’s Performance Funding Model.

Due to the nature of CSCR’s funding sources, potential changes in legislation and policies, and performance achieved, Respondents are advised that any contract awarded under this RFP may be modified to incorporate such changes, adjustments in the delivery system, or any activities provided.

**II. PROCUREMENT PROCESS AND TIMELINE**

Critical Date	Time	Procurement Action
<b>January 14, 2016</b>	n/a	RFP issued by CareerSource Capital Region
<b>January 25, 2016</b>	4:00 p.m.	Deadline for questions/requests for clarification
<b>January 28, 2016</b>	n/a	Answers to questions posted at <a href="http://www.careersourcecapitalregion.com">www.careersourcecapitalregion.com</a>
<b>January 29, 2016</b>	4:00 p.m.	Deadline for Letter of Intent to Propose
<b>February 17, 2016</b>	4:00 p.m.	Deadline for Proposal submittal
<b>April 19, 2016</b>	Noon	Board of Directors’ approval
<b>June 1, 2016</b>	n/a	Target date for contract execution
<b>July 1, 2016</b>	n/a	Provision of services begins

All times shown are Eastern Standard Time (EST). CareerSource Capital Region reserves the right to adjust the schedule when it is in the best interest of CareerSource Capital Region or to extend any published deadline in this RFP upon notification to those who have submitted a Letter of Intent to Propose by the date and time specified.

The Letter of Intent to Propose must clearly identify the Respondent, any subcontractor(s), and the activities/services that each subcontractor will deliver. This letter of intent does not commit a Respondent to submitting a proposal; however, a Letter of Intent to Propose must be submitted by the date and time specified above in order for the Respondent’s proposal to be accepted.



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The Letter of Intent to Propose and the proposal must be *received* at the CareerSource Capital Region Administrative office by the dates and times shown above. The prospective Respondent is solely responsible for ensuring that anything sent to CareerSource Capital Region arrives on time. The CareerSource Capital Region Administrative office is located at:

325 John Knox Road, Atrium Building – Suite 102  
Tallahassee, Florida 32303  
Telephone Number: (850) 414-6085  
Fax number: (850) 410-2595

### A. Questions and Requests for Clarification

All questions/requests for clarification must be submitted and **received** in writing via email by January 25, 2016 not later than 4:00 p.m. to:

Keantha Belton Moore, Director of Operational Excellence  
[RFP2016-01@careersourcecapitalregion.com](mailto:RFP2016-01@careersourcecapitalregion.com)

Verbal questions/requests for clarification shall not be accepted. Further, CSCR reserves the right to reject any or all requests for clarification, in whole or in part.

All written questions/requests for clarification that are accepted by CSCR will be posted to the CareerSource Capital Region website by January 28, 2016 at [www.careersourcecapitalregion.com](http://www.careersourcecapitalregion.com).

To avoid actual or perceived conflict, or undue influence over the process, all respondents (including current Contractor if a proposal is submitted) are prohibited from contacting any CSCR board member, committee member or staff (other than the contact listed above) regarding this RFP. Contact with anyone for purposes of influencing the outcome of the procurement will result in disqualification of the prospective Respondent from this competitive procurement process.

## III. **BACKGROUND INFORMATION**

### A. Big Bend Jobs and Education Council, Inc. d/b/a CareerSource Capital Region

The Big Bend Jobs and Education Council, Inc. d/b/a CareerSource Capital Region is a not-for-profit corporation 501(c)(3) and has been certified by Florida's Governor as a Regional (Local) Workforce Development Board. CSCR is one of 24 local workforce development boards/areas in the state of Florida and is designated as Local Workforce Development Area (LWDA) 5. CareerSource Capital Region's principal function is the oversight of, and policy guidance to the workforce development systems in Gadsden, Leon and Wakulla counties.

CareerSource Capital Region is governed by a board of directors (Board) comprised of volunteers from all three counties in the region who represent private-sector business, labor, economic development, education, veteran's interests, philanthropy, community-



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based organizations and state agencies. Joint oversight is provided through an inter-local agreement between CSCR and County Commissioners from each of the three counties in LWDA 5.

**Mission:** CareerSource Capital Region connects employers with qualified, skilled talent and Floridians with employment and career development opportunities to achieve economic prosperity in Gadsden, Leon, and Wakulla Counties.

**Vision:** Florida will be the global leader for talent.

### Our Values:

- **Business-Driven:** We believe Florida employers – the state’s job creators – are essential to our overall success in providing effective, market-relevant workforce solutions that drive economic growth and sustainability.
- **Continuous Improvement:** Driven by our commitment to excellence, we respond to changing market dynamics. We continually strive to improve our performance to better anticipate and address the talent needs of employers and the employment and skills needs of job seekers and workers. We identify, measure and replicate success.
- **Integrity:** We fulfill our mission with honesty and accountability and strive in every decision and action to earn and protect the public trust.
- **Talent Focus:** We believe in the power of talent to advance every enterprise and open the door to life-enhancing economic opportunities for individuals, businesses and communities. Our commitment is to make talent Florida’s key competitive asset.
- **Purpose-Driven:** Our work is meaningful and through it, we can inspire hope, achievement and economic prosperity in the lives of the customers we serve.

The CareerSource Capital Region Strategic Goals are to:

1. Develop a streamlined model to support employers.
2. Improve the effectiveness of our service delivery.
3. Attract, develop and retain top talent.
4. Develop and improve partnerships that enhance workforce development.
5. Ensure that the community understands and recognizes our value and services.

### **B. Workforce Innovation and Opportunity Act (WIOA) of 2014**

The workforce services to be provided shall be in accordance with the Workforce Innovation and Opportunity Act (WIOA), P.L. 113-128, enacted July 22, 2014. As the first legislative reform of the public workforce system in more than 15 years, WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. WIOA authorizes the Job Corps, Youth Build, and Migrant and Seasonal Farmworker programs, in addition to the core programs. WIOA is designed to strengthen and improve our nation’s public workforce system and help put Americans back to work.



WIOA is one of CSCR's primary sources of funding for workforce development services. Respondents shall be familiar with the WIOA and the federal regulations applicable to the WIOA. Both WIOA and the regulations can be accessed on the Department of Labor's site ([www.doleta.gov](http://www.doleta.gov)).

The State of Florida's Workforce Innovation Act of 2000 is the short title for Florida Statutes Chapter 445 - Workforce Services. It is the governing state law for workforce development activities in Florida. It is the Respondent's responsibility to be familiar with this law and the State rules and regulations applicable to it. This law can be found at the Florida legislature's website (<http://www.leg.state.fl.us/>). Governing Florida policy can be accessed from the Florida Department of Economic Opportunity's website: ([www.floridajobs.org](http://www.floridajobs.org)).

### C. Governing Authority

The Respondent hereby agrees to comply with the Workforce Innovation and Opportunity Act (WIOA), Florida Workforce Innovation Act, Personal Responsibility and Work Opportunity Reconciliation Act, Wagner-Peyser Act, Trade Act, Supplemental Nutrition Assistance Program Employment & Training, and Welfare Transition Program, and all applicable Federal, State and local laws, regulations, policies, plans, and instructions as they pertain to the Contract which are in effect at the inception of the contract or as may be promulgated or amended during its life, and will require its subcontractors to do likewise. When determining applicability, all programs and activities funded, or otherwise financially assisted, in whole or part, under WIOA or the Welfare Transition Program are considered to be programs and activities receiving federal financial assistance.

## IV. OVERVIEW OF SERVICES SOLICITED UNDER THIS RFP

### A. Contractor Responsibility and Restrictions

No more than one organization will be selected as the Contractor to deliver all activities and services described in this RFP. Each Respondent is advised that CareerSource Capital Region will hold the Contractor totally responsible and accountable for effectively and efficiently managing and delivering the services and activities described in this RFP while providing excellent customer service and achieving the contracted performance outcomes. The Contractor may subcontract with other entities with prior approval of CareerSource Capital Region; Respondents are encouraged to utilize minority and women-owned and operated businesses as subcontractors. A proposal that includes subcontracting all activities and services in this RFP to other organizations will not be considered responsive.

Any proposing entity that is a CareerSource Capital Region approved training provider for occupational skills training will be required to specify in its proposal how any actual or perceived conflict of interest would be eliminated.

**B. Services to Business Customers**

Direct services to business customers are not being solicited under this RFP as CSCR directly provides services to business customers through its Business & Employer Solutions team. The designated Contractor staff must work as a unified team with CSCR’s BES team in order to ensure optimal job matching services are provided.

**C. Customer Service Levels**

The following number of customers were provided services during the 14/15 program year:

<u>Service Level / Description</u>	<u>14/15</u>
<b>Job Seeker:</b>	
1. Registered Individuals	129,535
2. Individuals Served	24,647
3. Intensive Services	125 (WIOA); 687 (WP)
4. Training Services	350
<b>Employer:</b>	
1. Internal job orders received	2,414
2. Employer services provided	21,097
3. Total Placements	8,814

The following caseload numbers were the average monthly regional caseload sizes during the 14/15 program year:

<u>Program/Service</u>	<u>Number of Customers</u>
<b>WIOA Adults</b>	340
<b>WIOA Dislocated Workers</b>	200
<b>WIOA Youth</b>	475
<b>Welfare Transition</b>	881
<b>Veterans Registered/Served</b>	1,312/1,009
<b>Supplemental Nutrition Assistance Program</b>	144*
<b>TAA</b>	0
<b>PREP</b>	67

\* The SNAP E&T program was voluntary during the 14/15 program year; however, is now mandatory as of January 1, 2016. As such, historical numbers cannot be directly used to project future enrollments/program participation for this program.

Note: The historical and projected numbers shown above are provided for planning estimates only. Actual service levels may be higher or lower depending on the local economy, impact of marketing, changes in legislation and/or funding, etc.

**D. Contractor Orientation/Competency**

CareerSource Capital Region will offer the necessary training to Contractor(s) on the documents, operating procedures, and Management Information System requirements that

are specific/unique to workforce development services solicited in this RFP, within certain limitations. It is a requirement that Contractors have the professional experience, prior training and applicable professional judgment within their staff/organization to perform/accomplish the proposed goals, objectives and activities submitted in accordance with workforce development services solicited in this RFP. As administrative staffing and funding are limited for the training and technical assistance to Contractors, Contractors with prior WIOA experience may be given additional consideration for documented performance and understanding of workforce development programs as previously delivered.

### ***Management Capability***

Respondents must clearly and completely demonstrate the organizational and management capacity necessary to ensure that the services and/or outcomes to be provided are achieved during the contract. These include but are not limited to:

- Delivering high quality, timely, complete, consistent, and compliant contracted services.
- Meeting or exceeding the contract objectives and performance goals.
- Working effectively with CSCR staff, other service providers and community partners.

Upon contract award, the Contractor shall designate a knowledgeable primary point of contact who shall have optimum management and operations authority and be available to CSCR during normal CSCR business hours (as further prescribed in the Scope of Work). During peak performance periods or emergencies, the Contractor's primary point of contact and/or his/her designee(s) may be required to be available beyond these parameters. Contact information shall be made available to CSCR leadership for after-hours assistance.

### **E. Performance Expectations**

The Contractor will be held to specific performance deliverables as prescribed by CSCR. Each Respondent must have a clear understanding of the performance measurement tools used in Florida (i.e., the Federal Common Measures and the Performance Incentive Funding (PIF) model) as well as any local performance criteria established by CSCR. Further, Respondents must understand that CSCR has an expectation of excelling in both the common measures and the PIF in order for CSCR to perform well, to ensure that CSCR is not subject to corrective action by the state and to provide CSCR with the opportunity to earn performance incentives.

The Contractor must be able to commit to ensuring the appropriate internal processes and staffing are in place to help CSCR meet the contracted/expected levels of performance and lead CSCR to the top quartile in the state for performance.



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For informational purposes, please see the below chart outlining the performance deliverables outlined in the current 15/16 Workforce Services Contract:

<b>Performance Measure</b>	<b>15/16 Goal</b>	<b>Requirement</b>	<b>Comment</b>
<b>Overall Placements</b>	2,000 Staff-Entered Placements	Contractor will work in coordination with CSCR to ensure job seeker customers served in CSCR's operating area obtain employment.	Note: The placement goal is a subset of the overall number of placements that occur in CSCR's operating area.
<b>Placements – Internal Job Orders</b>	335 Placements Against Internal Job Orders	Contractor will work in coordination with CSCR to ensure job seeker customers served in CSCR's operating area obtain employment.	Note: It is expected that this goal will increase as the new service delivery model is implemented to include effective job matching and referral strategies.
<b>DEO Quality Assurance Review</b>	Error rate of 10% or less	Contractor will work to ensure that programs are operated in a manner that are consistent with federal, state and local policies in order to reduce findings and other issues of non-compliance.	None.
<b>Case Management for WIOA Adults and Dislocated Workers</b>	100% engagement rate	Contractor will work to ensure that all individuals enrolled as an Adult or Dislocated Worker are actively engaged by and with their assigned staff. Contact/engagement is encouraged no less than monthly; however a period of no contact by staff may not exceed 45 days.	None.
<b>Case Management for WIOA Youth</b>	100% engagement rate	Contractor will work to ensure that all enrolled Youth are actively engaged by and with their assigned staff. Contact/engagement is encouraged no less than twice per month; however, a period of no contact by staff may not exceed 30 days.	None.
<b>WIOA Adult and Dislocated Worker Follow-up</b>	100% completion rate	Follow-up must be completed for 100% of those individuals whose cases were closed for each of the following intervals: 1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> and 4 <sup>th</sup> quarters after exit.	None.
<b>WIOA Youth Follow-up</b>	100% completion rate	Follow-up must be completed for 100% of those individuals whose cases were closed for each of the following intervals: 1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> and 4 <sup>th</sup> quarters after exit.	None.
<b>Adult Entered Employment Rate</b>	85% using DEO's Monthly Management Report (MMR)	Contractor will ensure that WIOA Adults who were unemployed at participation are employed at closure.	Note: Performance Goals will be derived based upon the following criteria: <ul style="list-style-type: none"> <li>• The state's negotiated goals with USDOL</li> <li>• The LWDA's negotiated goals with the state</li> <li>• Goals more stringent that either of the above as determined by CSCR.</li> </ul>

<b>Dislocated Worker Entered Employment Rate</b>	85% using DEO's Monthly Management Report (MMR)	Contractor will ensure that WIOA Dislocated Workers who were unemployed at participation are employed at closure.	Same comment as Adult Entered Employment Rate.
<b>Adult Credential Attainment Rate</b>	85% using query, manual data or EFM predictive report	Contractor will ensure that WIOA Adults who were enrolled in education at participation, or any time during the program, have attained a post-secondary certificate at closure.	Same comment as Adult Entered Employment Rate.
<b>Dislocated Worker Credential Attainment Rate</b>	85% using query, manual data or EFM predictive report	Contractor will ensure that WIOA Dislocated Workers who were enrolled in education at participation, or any time during the program, have attained a post-secondary certificate at closure.	Same comment as Adult Entered Employment Rate.
<b>Youth Placement in Employment or Education</b>	55% using query, manual data or EFM predictive report	Contractor must ensure that youth who are not in post-secondary education, employment, or the military at participation are either employed; in the military; enrolled in post-secondary education; advanced training; or occupational skills training at closure.	Same comment as Adult Entered Employment Rate.
<b>Youth Credential Rate</b>	75% using query, manual data or EFM predictive report	Contractor will ensure that Youth who are enrolled in education at participation, or any time during the program, have attained a diploma, GED or certification at closure.	Same comment as Adult Entered Employment Rate.
<b>Youth Skills Gains</b>	35% using query, manual data or EFM predictive report	Contractor must ensure that out-of-school youth who are basic skills deficient (BSD) in either literacy or numeracy increase one or more educational functioning levels by their one-year anniversary date of participation.	Same comment as Adult Entered Employment Rate.
<b>Welfare Participation Rate</b>	50% on the MMR	Contractor will engage families receive TANF that include a work-eligible adult or minor head-of-household in countable work activities.	None.
<b>Welfare Entered Employment Outcome Rate</b>	27.5% on the MMR	Contractor will assist TANF customers with obtaining employment to ensure cases are closed due to earnings.	None.

Note: These objectives are provided as an example of the performance measures and required levels of performance that may be required. Actual performance levels and standards are subject to change and will be established through contract negotiation.

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## V. KEY PROVISIONS

The selected Contractor will be bound to the following key provisions in the contract once executed:

### A. Audit Requirements

- a. The services delivered under the Contract are considered sub-recipient services and require compliance with audit requirements for federal funds required by 2 CFR 200.430. As Contractor is expending more than \$750,000 in federal funds during the term of the Contract, the Contractor shall have an annual independent financial and compliance audit that includes coverage of workforce services within its scope, and is conducted in accordance with generally accepted auditing standards as required by 2 CFR 200.430.
- b. Contractor must submit a copy of their independent audit report as required by 2 CFR 200.430 within thirty (30) calendar days after its receipt by the Contractor but not later than nine (9) months after the end date of the Contract.

### B. Internal Financial Controls

- a. Contractor shall be responsible for implementing procedures and internal financial controls governing the management and utilization of funds provided hereunder. The procedures and financial controls must be established pursuant to Generally Accepted Accounting Principles (GAAP) procedures.
- b. Contractor will maintain separate accounting records for all funds expended under the Contract to ensure compliance with all federal and state laws and to ensure that the funds have not been unlawfully spent. All expenditures must be allowable, allocable, necessary and reasonable for proper and efficient operation of the program under the appropriate funding source administered.
- c. Contractor will make available all accounting records for review upon request for examination, audit, or for the making of excerpts or copies of such records for the purpose of determining compliance with all applicable rules and regulations and provisions of the Contract.

### C. Refunds/Credits

Refunds or credits from training institutions or other vendors for unearned funds or costs that have been paid by CSCR shall be returned to CSCR within ten (10) days of being received by the Contractor or shall be accounted for in the following reimbursement request with a reduction equal to the refund or credit.

#### D. Indirect Cost Rate Plan

Overhead, allocated and indirect programmatic costs are allowed and annually the Contractor must submit an Indirect Cost Rate Plan to CSCR for approval. Profit is not allowed in the delivery of services under the Contract.

#### E. Interest & Program Income

- a. CONTRACTOR shall hold all funds in an insured interest-bearing account.
- b. CONTRACTOR should not leave cash resulting from earned program income sitting idle in a bank account. Cash on hand should be limited to the amount needed for immediate disbursement.
- c. Program income earned on WIOA Title I programs, which include WIOA Adult, WIOA Youth, WIOA Dislocated Worker, funding streams, can be expended as program income.
- d. For all other funding sources, including Welfare Transition Program, Reemployment Assistance, and all state programs, interest income over \$250 must be returned to CSCR no less often than quarterly.

#### F. Stand-In Costs

Costs paid from non-federal sources may be used to stand-in for disallowed costs identified as a result of a monitoring report or audit. These costs must be reported as uncharged program costs and must have been allowable under the grant for which the stand-in costs are offered. They are subject to verification through an audit and must be reported in accordance with standards set by 2 CFR 200.430.

#### G. Purchasing/Inventory

- a. All purchasing must be in compliance with CSCR's procurement guidelines. Records must be maintained to document procurement efforts to comply with this requirement.
- b. Equipment purchased as defined as tangible, nonexpendable personal property having a useful life of more than one year and an acquisition cost of \$5,000 or more per unit, including all costs related to the property's final intended use, shall first receive prior approval from CSCR.
- c. An up-to-date inventory of all property purchased that has an individual purchase price of \$5,000 or more must be maintained and shall not be disposed of without prior written authorization.
- d. Title to supplies, equipment, real property and other expendable property acquired by a recipient of federal funds shall vest in the recipient upon acquisition for the authorized

- purpose of the project as long as it is needed and shall not encumber the property without approval of the United States Department of Labor (USDOL).
- e. All supplies, equipment, real property and other expendable property shall be returned within forty-five (45) days of Contract termination or when the property is no longer needed.

#### H. Use of Equipment

Any equipment purchased under the Contract or provided by CSCR for use in delivering the services under the Contract shall be used exclusively by the applicants and/or participants unless an equipment user agreement has been made part of the Contract. Such equipment is and shall remain the property of CSCR.

#### I. Insurance

Contractor shall deliver to CSCR prior to the commencement of the Contract satisfactory evidence in the form of a Certificate of Insurance that the following insurance coverage, as appropriate, are in force and will not be canceled without thirty (30) days written notice to CSCR. Such a Certificate shall serve as proof that all Insurance and fidelity bonds, if applicable, are current and that all appropriate employees of Contractor are covered. CSCR may withhold payments or terminate the Contract if the Contractor fails to maintain or provide evidence of current insurance.

- a. Liability Insurance: Contractor agrees to obtain a standard liability insurance policy in the single limit amount of \$1,000,000 and will provide general liability insurance in the amount of \$100,000 per person and \$200,000 per occurrence with an endorsement naming Big Bend Jobs and Education Council, Inc. as an additional insured, unless Contractor is self-insured. If Contractor is self-insured, Contractor must be able to provide the same coverage and must submit proper documentation to CSCR as evidence of such.
- b. Workers' Compensation: To the extent that the state Workers' Compensation law is applicable, Contractor must provide Workers' Compensation coverage to all employees paid directly under the Contract. Where employees covered under the Contract are not covered under a state Workers' Compensation law, then the Contractor shall provide insurance coverage for injuries suffered by employees. Income maintenance coverage is not required.
- c. Motor Vehicle Insurance: Contractor agrees to obtain Motor Vehicle Insurance coverage in the amounts of \$50,000 property damage, \$100,000 per person and \$300,000 per occurrence, for all motorized vehicles owned or leased by the Contractor to be used in the performance of actions authorized by the Contract.



Contractor shall ensure that all employees receiving travel reimbursement, including mileage, have current motor vehicle insurance. Contractor shall comply with this part by maintaining copies of its employees' current, personal insurance cards. CSCR may, at any time, require the Contractor to produce copies of insurance cards for employees receiving mileage reimbursements.

- d. Bonding: Contractor shall carry an Employee Fidelity Bond on every officer, director, agent, or employee authorized to receive or deposit Welfare Transition funds or issue financial documents, checks, or other instruments of payment of program costs. Bond shall be in the amount of \$100,000 or the total amount of the Contract, whichever is less. The bond shall be effective prior to any contract payment and for at least twelve (12) months after the Contract terminates and CSCR shall be named as beneficiary.

Contractor shall assure and require that all subcontractors maintain the same type of insurance.

All property and equipment purchased by the Contractor under the Contract shall be insured against, fire, theft and destruction in an amount equal to the full replacement cost.

#### J. Access to Records

- a. At any time during normal business hours and as often as CSCR, the State of Florida Department of Economic Opportunity (DEO), USDOL, Comptroller General of the United States, or their designated representative may deem necessary, Contractor shall make available all appropriate personnel for interviews and all such financial, applicant, or participant books, documents, papers and records (including computer records), or other data relating to matters covered by the Contract, for examination, audit, or for the making of excerpts or copies of such records for the purpose of auditing and monitoring program activities and determining compliance with all applicable rules and regulations, and the provisions of the Contract. The above referenced records shall be made available at the Contractor's expense, at reasonable locations as determined by CSCR.
- b. Annually Contractor shall provide copies of W-2 forms to be compared against the USDOL's most recent ETA salary/bonus threshold in order to ensure compliance with the current limitation.

#### K. Participant Record Confidentiality

- a. Contractor must comply with the confidentiality provisions and the record retention requirements of sections 119.021, F.S., where applicable.

- b. All Contractor records classified as public records must be open and available for inspection by any person unless otherwise specified by law. It is the responsibility of the Contractor to maintain records in a location that is accessible to the public.
- c. Contractor shall not disclose any information concerning a workforce services applicant or participant to any agency or individual, other than CSCR, for any purpose without written consent of the participant, or his/her responsible parent or legal guardian.
- d. Contractor shall adhere to CSCR's Establishing & Maintaining Confidentiality Directive and require all staff to sign CSCR's Individual Non-Disclosure & Confidentiality Certification Form upon initial hire.

#### **L. Information Security**

- a. Contractor will ensure that all staff review BOARD policies related to information systems security and Contractor will comply with employment penalties outlined therein for its employees found to be in violation of such policies. Contractor will ensure that it follows BOARD procedures for information system's account creation, maintenance and termination related to Contractor's employees and the DEO positions for which the Contractor provides oversight.

#### **M. Code of Conduct and Business Ethics**

Contractor shall maintain written standards of conduct governing the performance of its employees engaged in the award and administration of contracts. No employee, officer, or agent shall participate in the selection, award, or administration of a contract supported by federal funds if a real or apparent conflict of interest would be involved. Such a conflict would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. The officers, employees, and agents of the Contractor shall neither solicit nor accept gratuities, favors, or anything of monetary value from Contractors, or parties to sub-agreements. However, Contractor may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct shall provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the Contractor.

Contractor shall adhere to CSCR's Code of Conduct and Business Ethics policy and require all staff to sign CSCR's Code of Conduct and Business Ethics policy upon initial hire. Further, Contractor shall comply with all federal, state and local laws and regulations related to financial practice and corporate governance.

#### **N. Staff Hiring, Qualifications & Training**

- a. Contractor will hire and manage qualified and trained staff, in accordance with industry and/or educational standards as well as staff who demonstrate the highest propensity to operate under the envisioned integrated service delivery model.
- b. Removal and/or replacement of key personnel require the prior approval of CareerSource Capital Region who must be notified within five (5) calendar days that a vacancy is possible. In the event key staff positions are vacated, the Contractor will have no more than 60 calendar days from the date of notification to CareerSource Capital Region to fill such vacancy. Failure to fill a key vacancy within the allotted time may result, at the sole discretion of CareerSource Capital Region, in the forfeiture of a part or the total negotiated performance incentive for the quarter(s) in which the vacancy exists.
- c. Each funded position must have a specific, written job description which includes the minimum required qualifications and skills for the position, the overall job duties to be performed by the position and the responsibility and authority of the position.
- d. When filling open staff and management-level positions, Contractor will provide CSCR with the opportunity to review candidate qualifications and to designate CSCR staff to participate on interview panels. Note: while this provides an opportunity for CSCR staff to be engaged in the hiring process, the authority to make hiring decisions is that of the Contractor.
- e. Contractor will develop and maintain training plans for all front-line positions which includes specific competencies and training resources.
- f. Contractor will implement a system to assess staff's mastery of identified competencies. The Contractor will coordinate with CSCR to develop competency exams and question sets to ensure alignment with federal, state and local expectations.
- g. Contractor will maintain a performance management system in which an employee in a funded position will receive a written review at a minimum annually regarding his/her performance unless deemed otherwise appropriate for more frequent reviews.
- h. Contractor will establish jointly with staff, goals that are in alignment with the Performance Deliverables outlined in Contract and federal, state, and local quality assurance requirements. The establishment of these goals will be to ensure that staff understands their individual role in aiding towards the attainment of said deliverables.
- i. Contractor will provide qualified programmatic and technical staff with the expertise to meet the goals, objectives and requirements of the services to be provided through the CareerSource Capital Region offices. The Contractor will implement and maintain an effective training program which includes both management and staff development.

- j. Contractor will require that all employees obtain their Florida Certified Workforce Professional Tier I certification (or its equivalent) within six (6) months of their date of hire. The Contractor will require that staff with direct customer contact complete 15 hours of continuing education during each program year to include customer service training.
- k. Contractor will provide and/or make available training on a regular basis regarding all workforce development programs, and special grants/projects guidelines, policies and best practices.
- l. Annually, Contractor will develop a regional training plan that addresses the training and development needs of regional staff as assessed and determined at the onset of the program year. Contractor staff will ensure that CSCR staff input is sought and incorporated into the annual regional training plan. Contractor and CSCR will review the plan quarterly to ensure adjustments are made to meet organizational needs.
- m. Contractor will require all staff to complete security awareness training within 30 days of the employment start date. All certificates signifying the completion of training shall be submitted to CSCR's Human Resources Manager. Additionally, Contractor will coordinate with CSCR's information technology Contractor to ensure that ongoing information security refresher training is provided to all employees no less than annually.
- n. Contractor will be required to list all of its organization's job vacancies in EFM and provide placement information to CSCR staff.

#### **O. Staff Salaries and Incentives**

Contractor will ensure that it develops and maintains a compensation plan that provides for job progression within job families for staff and entails a process for staff to receive merit/performance-based salary increases and/or bonuses if budgetary monies are available. Contractor may consult with CSCR's Human Resources Manager for assistance in the development of such plan should Contractor not have one developed.

#### **P. Health and Safety**

- a. Health and safety standards, including Child Labor Laws, established under state and federal law, otherwise applicable to working conditions of employees shall be applicable to working and training conditions of workforce services participants. Where participants or employees covered under the Contract are engaged in activities not covered under the Occupational Health and Safety Act of 1970, they shall not be required or permitted to work, be trained, or receive services in buildings or surroundings or under working conditions which are found to be unsanitary, hazardous or dangerous to their health or safety.
- b. Contractor will adhere to CSCR's Emergency Preparedness and Continuity of Operations Plan (COOP) and ensure that staff designated in the COOP are sufficiently

knowledgeable of their roles during emergencies or situations that may disrupt normal operations. Further, Contractor will ensure that all of its staff are knowledgeable of their roles during emergencies or disruptions. In accordance with the COOP, Contractor shall ensure that all new employees review the COOP within 30 days of the employment start date, that the COOP be reviewed with all staff no less than annually, and that each career center performs safety drills at a minimum of once per year unless otherwise appropriate for more frequent drills.

#### **Q. Pre-employment and Subsequent Screenings**

- a. Contractor will develop and maintain written policies regarding pre-employment and periodic criminal background screenings, drug-screenings and credit checks to address the actions that may occur in the event that a screening or check results in a finding. CONTRACTOR agrees that it will develop and maintain these written policies in accordance with all state and federal laws, including without limitation, the Fair Credit Reporting Act, the Florida Civil Rights Act and Title VII of the Civil Rights Act of 1964. CONTRACTOR also agrees that it will develop and maintain the written policies in accordance with The Equal Employment Opportunity Commission’s (“EEOC”) Enforcement Guidance Number 95.002 issued April 25, 2012, titled “Consideration of Arrest and Conviction Records in Employment Decisions under Title VII of the Civil Rights Act of 1964.”
- b. Contractor will conduct pre-employment criminal background screenings on all new hires and employees with access to protected personal identification information housed in participant files as well as state and local databases. In accordance with the Grantee-Subgrantee Agreement between CSCR and DEO and Chapters 435.03 and 435.04(2), Florida Statutes, all employees must undergo the equivalent of a Level 1 background screening as a condition of hire and continued employment. Level 1 background screening includes, but need not be limited to, employment history checks and statewide criminal correspondence checks through the Florida Department of Law Enforcement (FDLE), and may include local criminal checks through local law enforcement agencies. The background screening results shall be used to determine eligibility for employment or continued employment, and approval of Contractor personnel performing work on behalf of CSCR.

Subsequent to initial hire, employees are required to undergo a Level 1 background screening no less than annually in order to align with CSCR’s policy. Contractor must designate one or more individuals, representing human resources or senior management, to be responsible for reviewing the results of the background screening against the referenced statutes above to ensure employment eligibility for prospective or current employees. Contractor must provide evidence that its designated reviewer(s) were trained on the requirements on Level I background screening as set forth in law.

- c. Contractor will conduct pre-employment and subsequent annual credit checks for all fiduciary positions. Contractor will maintain a list of positions with fiduciary responsibilities and will submit the list to CSCR at the beginning of each fiscal year and more frequently if requested. Contractor will notify CSCR of any actions taken as a result of findings related to the credit check within 24 hours of receiving notification.

#### R. Incident Reporting

Known or suspected incidents of fraud, injury, program abuse or criminal conduct shall be reported to CSCR immediately.

#### S. Reports

All reports and reimbursement requests shall be submitted to CSCR's Finance Office at 325 John Knox Road, Atrium Building, Suite 102, Tallahassee, Florida, 32303, including, but not limited to:

- a. Payment Request: Contractor shall submit to CSCR an invoice and any back-up documentation to include but not limited to a general ledger detail and financial reports as specified in the Contract. The invoice must be submitted each month. Services and/or training paid in full or in part under any other contract or from any other source are not eligible for payment under the Contract.
- b. Financial and Programmatic Reports: Contractor shall ensure that financial and programmatic reports be provided no less than monthly for all program areas managed unless otherwise directed by CSCR.
- c. Contract Close-Out Report: Contractor shall submit to CSCR a Contract Close-Out Report within ninety (90) days after contract termination, summarizing all payment requests, actual expenses, inventory and other items requested by CSCR.
- d. Program Income Report: Government or non-profit Contractors who generate program income from activities covered under the Contract, shall submit to CSCR a Program Income Report within ninety (90) days after contract termination.

#### T. Contractor Authority

- a. Contractor shall not enter into contracts and/or agreements on behalf of CSCR or its customers without prior written authorization from CSCR.
- b. Contractor shall not act as an agent or employee of CSCR beyond the Scope of Work described herein. If Contractor takes any action outside of this designated Scope of Work, Contractor shall be liable for all costs, fees and damages that may be incurred by Contractor or CSCR as a result of such actions.

#### U. Oversight

The CONTRACTOR will report to and be overseen by CSCR. The Contractor must openly and immediately communicate to CSCR leadership any challenges or problems faced by Contractor in the operation and management of the career centers that will adversely affect Contractor's performance of the Contract, or CSCR's ability to meet federal or state requirements.

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## VI. SCOPE OF WORK

It is the desire of CSCR to migrate to a service delivery model that enhances the ability of CSCR to meet the needs of both its job seeker and business customers by operating an integrated case management system (also referred to as integrated service delivery model) that eliminates programmatic silos and better avails job seeker customers to the array of workforce development services offered by CSCR. Referred to as the “Business and Industry First” model, the new model will seek to operate a system that ensures that business and industry are the primary customers whose needs serve as the foundational core of our operations. Although this model will be business centered, it will allow us to better meet their needs by increasing job seeker customers’ access to all services that CSCR has available. The model as a whole requires both Contractor staff and direct CSCR staff to work together to ensure operational success as well as to share the necessary information and data to allow for effective service delivery and continuous improvement.

CSCR is firmly committed to ensuring that CSCR provides universal services equitably to all of the various groups of employer and job seeker customers. CSCR must have solid, effective methods for serving a wide range of diverse groups.

A primary measure of success for the Contractor will be meeting and/or exceeding the performance measures set forth in the Contract. With respect to the day-to-day CSCR operations and management, the Contractor will be responsible for the functional integration of all workforce investment activities of CSCR to ensure that they meet the needs of employers and jobseekers by enhancing communication, coordination, collaboration and engagement of customers.

Successful Respondents will understand the human resource needs of business and our core industries and the training and employment needs of the full range of CSCR jobseekers.

Respondents should demonstrate substantial experience in assessing employer needs against labor market assets as well as workforce development and placement services. Proposals should describe Respondents:

- Capacity to expertly manage staff and operations;
- Ability to represent CSCR to the community as knowledgeable human resource professionals;
- Understanding of how to deliver high quality, customer-oriented service;
- Ability to work as a part of a team to satisfy our customers; and
- Ability to ensure our system delivers the service promised to customers.



To fully comply with the requirements of this RFP, the successful Respondent will perform all of the following services for CareerSource Capital Region throughout all locations. **Proposals for service delivery for less than CareerSource Capital Region's three-county operating area will be considered non-responsive.**

#### A. One-Stop Operator Job Description

CareerSource Capital Region defines the One-Stop Operator's job description is as follows:

- Provide functional supervision of all One-Stop Career Center required services, including all services provided by entities that have voluntarily entered into One-Stop Memorandums of Understanding (in accordance with WIOA).
- Ensure the appropriate delivery of workforce development services in accordance with all governing laws, statutes, regulations, guidance and policies.
- Coordinate all One-Stop Career Center activities with the CSCR's staff.
- Establish a single point of entry (electronic and physical) for job seekers.
- Continue to develop and enhance the workforce development system by focusing on a fully coordinated and integrated service delivery model that is market driven and offers value-added services to CSCR job seekers.
- Assure the delivery of services to individuals with limited English proficiency, disabilities, or other significant barriers.
- Promote adoption of creative and innovative methods and best practices in the delivery of the required services.
- Develop and maintain written policies, i.e., broad operational guidelines (such as hours of operation, etc.) that will outline the responsibilities and objectives of each of the One-Stop Partners while providing excellent customer service.
- Develop and maintain the One-Stop (Career Center Partners) Memorandums of Understanding
- Confirm with Board staff that MOU's or agreements are on file with the Board. The Contractor is expected to ensure that the One-Stop partner adheres to MOU's, agreements and reporting procedures. The Contractor will work with One-Stop Partners to ensure that staffs' training regarding the partner's services are provided to One-Stop staff.
- Ensure One-Stop partners follow the policies of the career center.
- Facilitate a meeting of all One-Stop partners in a specific career center where each partner's detailed procedures will be made known to all of the other partners.
- Increase customer satisfaction by developing flows and processes that are driven by feedback from both business and job seeker customers.
- Ensure timely and efficient handling of incoming telephone calls (possibly by a full-time switchboard operator who is knowledgeable of the basic available services and the current availability of staff).
- Coordinate and schedule facilities usage such as, but not limited to classrooms, assessment, and conference rooms.
- Enforce procedural, conduct, and appearance policies of CSCR.
- Abide by all Federal, State, and Board procurement policies.



## REQUEST FOR PROPOSAL – RFP # 2016-01 ONE-STOP OPERATOR – WORKFORCE DEVELOPMENT SERVICES

- Maintain records of all program related expenditures by cost categorization.
- Follow any current and future Board administrative directives especially those directives that concern: fiscal responsibilities of the day-to-day operation of the One-Stop Center, Equal Employment Opportunities, and the Americans with Disabilities Act.
- Advise and assist the Board on all items relevant to One-Stop Credentialing.

Further, it is the One-Stop Operator's responsibility to ensure non-discrimination in that customers' have an equal opportunity to access programs and services administered by CSCR. No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with programs on the basis of race, color, religion, sex, national origin, disability, age, political affiliation, marital status, sexual orientation or status as a workforce services, and each customer shall have such rights as are available under any applicable Federal, State, or local law prohibiting discrimination.

### **B. Locations**

The Contractor shall deliver the services described in this Scope of Work at the locations determined by CareerSource Capital Region. The current full service locations are:

CareerSource Capital Region – Gadsden Career Center  
1140 West Clark Street  
Quincy, Florida 32351

CareerSource Capital Region – Leon Career Center\*  
2525 S. Monroe Street, Suite 3-A  
Tallahassee, Florida 32301

\*Note – At the issuance of this RFP the relocation of the Leon Career Center is being negotiated.

CareerSource Capital Region – Wakulla Career Center  
2932 Crawfordville Hwy  
Crawfordville, Florida 32327

Levels of service needed in each location are dependent, to a certain extent, by the traffic within each office. Therefore, Respondents need to build in the flexibility to assign staff and other resources as needed to accommodate customer flow.

### **C. Hours of Operation**

Contractor will adhere to the following hours of operation for the CareerSource Capital Region offices in Gadsden, Leon and Wakulla counties unless otherwise approved by CSCR's CEO.



**REQUEST FOR PROPOSAL – RFP # 2016-01  
ONE-STOP OPERATOR – WORKFORCE DEVELOPMENT SERVICES**

**Gadsden County:**

Monday through Friday: 8:00am – 5:00pm  
Wednesday, Staff Meeting: 8:00am – 9:00am

**Leon County:**

Monday, Wednesday and Friday: 8:00am – 5:00pm  
Tuesday and Thursday (Late Nights): 8:00am – 6:00pm  
Tuesday, Staff Meeting: 8:00am – 9:00am

**Wakulla County:**

Monday through Friday: 9:00am – 12:00pm & 1:00pm - 5:00pm  
Thursday, Staff Meeting: 8:00am – 9:00am  
Closed for lunch (DAILY): 12:00pm – 1:00pm

Contractor will follow the listed holiday schedule (subject to CSCR revision) and close the career centers to customers on the days upon which the following holidays are observed:

- New Year’s Day
- Martin Luther King Day
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve
- Christmas Day
- New Year’s Eve

**D. Management and Delivery of Workforce Development Programs and Services**

1. Contractor will be responsible for providing day-to-day supervision and management of programmatic staff in the offices located in Gadsden, Leon, and Wakulla counties. This includes the functional supervision, oversight and management of assigned DEO staff (which include the Wagner-Peyser, Veteran, TAA and Migrant Seasonal Farm Worker staff) and the integration of DEO staff duties and responsibilities as they integrate with the overall service delivery operation of the career centers. The Contractor is responsible for technical and programmatic guidance and instruction for DEO staff within the career centers as well as DEO management level and staff level training and development within the career centers.
2. Contractor shall ensure that all staff hired as a result of the Contract, including subcontractor staff and all partners, understand and conduct business on a day-to-day basis in accordance with the Standard Operating Procedures approved by CSCR.

3. Contractor agrees to provide coordinating management and engagement of mandatory partner agencies that have staff co-located within the career centers in LWDA 5. The Contractor will serve as the local administrative contact for all co-located partners within the career centers. The Contractor will be responsible for initiating a “staffing” of any joint customers with the other partners’ case managers to ensure that no services are duplicated, and that to the degree possible, multiple funding streams are used for the provision of training services. The Contractor will maintain close working relationships with all mandatory partners to increase their involvement in, utilization of, and provision of resources to CareerSource Capital Region customers. Required core partners include WIOA Adult, Dislocated Worker, and Youth programs, Adult Education and Family Literacy, Wagner-Peyser Employment Services, and Vocational Rehabilitation.
4. Contractor will be responsible for tracking and collecting demographic information in accordance with Section 188 of the Workforce Innovation and Opportunity Act. The method for collecting this information for LWDA 5 will be through the Atlas system at the point of each customer’s self-initiated sign in to the kiosk prior to services being rendered. Note: All customers will be required to sign-in at the Atlas kiosks.
5. The Contractor will ensure that, aside from the MSFW Outreach Specialist, at least one additional Spanish/English bilingual staff person is present on a full-time basis in the career center in Gadsden County to ensure the needs of the Spanish-speaking population are met.
6. The Contractor will be responsible for delivering excellent customer service in the career centers. Contractor will coordinate with CSCR to determine the method(s) that will be used to measure customer satisfaction. CSCR may adopt one or more customer satisfaction measurement tool(s) as determined appropriate.
7. The Contractor will be responsible for achieving the performance outcomes for all funding sources as negotiated with CSCR and the State of Florida Department of Economic Opportunity and CareerSource Florida Inc. for CSCR.
8. The Contractor will utilize an automated tracking system to electronically process and track participants’ Individual Training Account vouchers and Purchase Orders, to include funding obligations. Contractor shall provide detailed system-generated reports listing obligated funds and expenditures by customer and program no less than monthly.
9. Contractor will be responsible for creating a strategy that seeks to connect job seekers with employment at the highest wage within the first quarter following their engagement with CSCR. Note: quarter is referencing a period of time (approximately 90 days) as opposed to referencing specific quarters within the program year. With the

goal being “rapid employment”, CSCR strives to reduce the period of time that an individual is without earnings and to reduce their likelihood of becoming long-term unemployed.

10. In keeping with WIOA, Contractor will seek innovative ways to serve customers with barriers to employment including ex-offenders, homeless individuals, veterans, persons with disabilities, etc.

## E. Program Operations

### 1. Program Orientations:

The Contractor will provide orientations as needed to customers seeking workforce services to ensure that these customers understand the full array of services available to them and program requirements, if applicable. The frequency of delivery of these orientations shall be included in each location’s master calendar but in no circumstances shall it be less frequent than once per week. The Contractor is encouraged to use web-based visuals to provide these orientations to ensure a consistent message and quality delivery.

The Contractor will review and assign Priority Reemployment Planning (PREP) activities in accordance with established federal, state and local guidelines.

The Contractor will review and update PowerPoint presentations and other related handouts and materials annually (or as needed to ensure continued compliance with federal, state and/or local policy updates) following the established document control process to ensure CSCR approval and that they meet the CareerSource Florida and CSCR’s branding criteria and standards.

### 2. Work Readiness Activities:

The Contractor will provide staff to coordinate and deliver assessments based on CSCR’s requirements for comprehensive assessment activities. The Contractor will coordinate with CSCR’s Business & Employer Solutions team to promote the use of assessments, tools and instruments with the employers in Gadsden, Leon & Wakulla counties as needed.

### 3. Workshops:

The Contractor will deliver and/or coordinate employability and life skills workshops in each career center. Customer satisfaction and workshop effectiveness will be gauged on an as needed basis as directed by CSCR.

The Contractor will provide a monthly schedule of workshops that will be promoted through various internal and external mediums. Contractor shall provide no less than two weeks’ notice to CSCR when making significant changes to the workshop calendar and offerings.

The Contractor will coordinate with the Executive Center regarding workshop offerings in order to identify opportunities to share relevant topics between offices and educate regional staff.

The Contractor will review and update PowerPoint presentations and other related handouts and materials annually (or as needed to ensure continued compliance with federal, state and/or local policy updates) following the established document control process to ensure CSCR approval and that they meet the CareerSource Florida and CSCR's branding criteria and standards.

4. Outreach and Recruitment:

The Contractor shall be responsible for adequately informing individuals, groups and partners of the services available. Outreach and recruitment shall also be conducted in order to attract a sufficient number of individuals who are in need of the services provided and who meet the requirements to receive such services that allow the Contractor to meet the contract's performance deliverables.

The Contractor will participate, in cooperation with CSCR, in targeted outreach efforts to recruit qualified candidates for local employers in need of workers. Contractor will institute a targeted outreach strategy and process to identify job seekers who may be viable candidates for internal (preferred) job postings in Employ Florida Marketplace (EFM) who are not current customers of CareerSource Capital Region (and may or may not be registered in EFM). Also, close collaboration with educational institutions will be maintained to recruit recent graduates and students nearing completion of approved training programs.

Outreach and recruitment methods may include formal advertising, use of reciprocal agreements with other agencies, flyers, brochures, word-of-mouth or other methods of program information dissemination. The Contractor must ensure that the outreach and recruitment is conducted within communities where potentially eligible customers reside and through on-going coordinated efforts with other community-based organizations. **Note: All marketing activities, materials, and publications must be approved by CSCR.**

Where levels of training enrollment warrant, the Contractor may place staff onsite at the location of approved training providers and partner agencies (with prior approval obtained from CSCR).

5. Universal Customers:

The Contractor will ensure delivery of basic career services to job seekers and will ensure that job seekers understand and can work with the EFM system and are registered in the system as a job seeker. The Contractor will ensure that job seekers have received the instruction needed to use the tools present in EFM to conduct a competent job search. This includes the construction of suitable resumes, job searching, the use of automated recruiting agents, and the proper incorporation of

keywords to ensure an effective job search campaign. Informal assessment of job readiness will be a key service as part of ensuring qualified candidates are referred to employers.

The Contractor will ensure that all staff is trained on assessment tools and benefits available to support the need for work-ready job seekers and focused case management. The Contractor will also provide ongoing analysis and feedback related to industry trends, job seeker analysis and skills gaps.

The Contractor will ensure that there is a system in place to monitor and address the provision of quality referrals. Quality job referrals are essential to CSCR being successful in aiding local businesses in meeting their talent needs and also to the Contractor meeting its goals tied to placements against internal (preferred) job orders.

The Contractor will establish processes to ensure that customers (including veterans) are consistently engaged in a manner that reduces their likelihood of exiting the system without employment.

6. Trade Adjustment Assistance:

The Contractor, in its role as oversight for assigned DEO- funded employees/positions, will ensure that the TAA Coordinator provides services to eligible Trade Adjustment Assistance (TAA) customers in accordance with federal, state and local requirements.

7. WIOA Adults & Dislocated Workers:

The Contractor will provide staff to manage the WIOA service delivery process which includes the provision of basic career services, individualized career services, and training services in accordance with the regulations and requirements of the Workforce Innovation and Opportunity Act, state requirements and local policy.

Contractor will enroll a sufficient number of WIOA Adults and Dislocated Workers (as determined by CSCR), who are unemployed at participation, with the goal(s) of being closed with unsubsidized employment or enrolled in training services. The number served will be a combination of carryover cases as well as new enrollments. Additionally, Contractor will work to ensure that, for participants who receive training services and who also gain employment, case closure occurs subsequent to the participant securing unsubsidized employment in which the individual uses a substantial portion of the skills taught in training.

To ensure CSCR meets required expenditure levels for ITAs, Contractor will enroll the appropriate number of Adults and Dislocated Workers in training services, as needed. Note: LWDA 5 is currently required to expend 35% of its WIOA Adult and Dislocated Worker expenditures on direct training costs.

While the Contract does not dictate a minimum number of Dislocated Workers, Contractor is required to have a CSCR-approved procedure that ensures that all prospective WIOA participants are first screened for Dislocated Worker eligibility/suitability and enrolled accordingly, prior to being enrolled as an Adult. Accordingly, the Contractor will be responsible for delivering WIOA defined self-directed career services to the universal customer of the career centers in Gadsden, Leon, and Wakulla counties.

All WIOA customers must be assessed for need and suitability prior to the receipt of career and training services. This process is used to measure the customer's likelihood to obtain employment in his/her career area of interest and at a self-sufficient wage, their ability to complete career and/or training services if enrolled, whether or not the customer has any barriers that may impede his/her ability to obtain/retain employment or complete services/training, and whether or not the customer has the resources needed to be successful. For those customers needing additional assistance with securing unsubsidized employment, the Contractor will be responsible for providing assessment services and individual consultation with customers. The Contractor will be responsible for the collection of WIOA program eligibility and suitability documentation as well as the maintenance of case records for all customers who are enrolled in WIOA. For those customers who require training in order to become employable, the Contractor will be responsible for gathering additional documentation of financial eligibility and for compliance with the requirements for Individual Training Accounts (ITAs) as defined by CSCR. Allowable ITA expenses for Adult and Dislocated Workers are tuition, fees of training providers, and books. This WIOA eligibility must be completed in accordance with the strict standards established by the State of Florida and USDOL.

The Contractor will coordinate with CSCR to establish the necessary processes to ensure the appropriate enrollment of customers into WIOA as well as the appropriate approval of ITAs through the establishment of teams convened for this purpose.

The Contractor will ensure that individuals are enrolled in appropriate occupational skills and work-based training services in order to ensure CSCR meets the state of Florida's required ITA expenditure rate for WIOA Adult/DW funds.

The Contractor will provide staff who will manage the cases of customers enrolled in WIOA through the process concluding with the customer's securing unsubsidized employment. The Contractor shall be responsible for enrolling and determining the priority of service for individuals prior to providing training services with WIOA funds. Registration involves certifying and documenting the WIOA eligibility and priority of service of the individuals to be served.

The Contractor will provide staff to conduct follow-up services with WIOA customers that are compliant with WIOA regulations and local policy.



The Contractor will be required to report staff costs for each career center on a monthly basis for individuals in training, such as case management and services that are necessary to enable an individual to participate in training activities.

8. WIOA Youth Services (In-School and Out-of-School) Ages 16-24:

The Contractor will supply staff to manage the provision of outreach, recruitment, intake, assessment, case management and data entry of services related to those eligible and suitable youth participating in the WIOA Youth Program in Gadsden, Leon and Wakulla counties. These services must be provided in accordance with WIOA law and regulations as well as state and local policies.

The Contractor will collaborate and coordinate with community partners on issues affecting and involving service delivery to eligible and suitable youth. The Contractor will provide services to eligible and suitable In-School and Out-of-School Youth, either directly or through collaborative partnerships that will result in achieving one or more positive outcomes as required by WIOA.

The Contractor is responsible for documenting eligibility and suitability for all WIOA Youth participants in accordance with WIOA and local policy.

The Contractor will work with the Business & Employer Solutions team to develop work experience (as further outlined in section “16. Work Experience” herein) and employment opportunities with employers in Gadsden, Leon and Wakulla counties. The Contractor will ensure that all referred Youth match the hiring needs of employers.

The Contractor will serve both In-School and Out-of-School Youth with an emphasis on Out-of-School Youth. Contractor will ensure that a minimum of 75% of the Youth served in the WIOA Youth Program meet the definition of Out-of-School. Note: Due to the emphasis in WIOA on spending 75% of WIOA youth funds on out-of-school youth, new enrollments of in-school youth will be limited to the parameters outlined in local policy regarding the 5% exception.

a. Caseloads

Contractor will enroll a sufficient number of WIOA Youth (as determined by CSCR), with the goal(s) of being enrolled in education or training activities or being closed with unsubsidized employment. The number served will be a combination of carryover cases as well as new enrollments. Contractor must ensure that of the total number of Youth served, the percentage of Out-of-School Youth is not less than 75%. Additionally, Contractor will work to ensure that, for participants who receive training services and who also gain employment, case closure occurs subsequent to the participant securing unsubsidized employment in which the individual uses a substantial portion of the skills taught in the training.

b. Outreach and Recruitment

- Contractor will use necessary strategies to recruit WIOA-eligible and suitable youth to provide appropriate services.
- Contractor will work with CSCR to determine the areas of most need and coordinate services accordingly.
- Contractor will coordinate recruitment and outreach efforts with CSCR for the creation of marketing materials to include flyers and program fact sheets.
- Contractor will coordinate recruitment and outreach efforts with the local schools, the Department of Juvenile Justice, agencies working with youth with disabilities, foster care agencies and other community agencies and groups providing services to the target population.

c. Community Partnerships

- Contractor will work with CSCR to maintain current goodwill relationships with community partners who serve the youth population in Gadsden, Leon and Wakulla counties.
- Contractor will work to establish new relationships with youth service providers as deemed necessary and will report progress to CSCR monthly.
- Contractor will participate in career fairs and other events at local schools and community agencies that are consistent with CSCR'S mission and vision and do not interfere with the operation of normal program elements.
- Contractor will submit an outreach plan to CSCR on a quarterly basis.

Contractor will provide follow-up services for all WIOA Youth Program case exits as required by the Workforce Innovation and Opportunity Act guidelines. As part of the follow-up process, the Contractor will obtain documentation of placement and/or retention in post-secondary education, military, or employment as needed.

9. Customer Engagement and Case Management

CSCR recognizes case management as a key component of the service delivery model and critical to the ultimate success of the customer. Also, consistent customer engagement and effective case management are essential to the provision of quality workforce services to job seeker customers. It also maximizes the ability to conduct follow-up with customers both before and after they have obtained employment and increases the likelihood of customers sharing positive outcomes (job placement, credential attainment, etc.) with Contractor staff.

As part of the integrated service delivery model, CSCR expects that customers who are enrolled in more than one program receive integrated case management services. Integrated case management means an individual who receives benefits/services under two or more programs, such as WT and WIOA, would deal with only one case

manager from the beginning of the service delivery process through the provision of services. Integrated case management is also a process activity that ensures that the customer is progressing through the service strategy agreed to and that on-going contact with the customer is maintained throughout the time of participation, upon employment, and following program completion.

Contractor will ensure that all individuals enrolled in WIOA are actively engaged by and with their Career Specialist. For Adults/Dislocated Workers, contact/engagement is encouraged no less than monthly; however, a period of no contact by staff must not exceed 45 days. For Youth, contact/engagement is encouraged no less than twice per month; however, a period of no contact by staff must not exceed 30 days. Staff will utilize service codes and case notes as outlined by CSCR to document customer engagement in EFM.

Additionally, Contractor must ensure that a consultative case management model be operated in the career centers.

10. Welfare Transition Program:

The Contractor will supply staff to manage the work registration process for customers who have applied for TANF, the work participation case of each mandatory individual that is currently receiving TANF, and transitional customers with closed TANF cases who are now receiving transitional benefits/support services through the Welfare Transition (WT) Program.

The Contractor will be responsible for delivering case management services that comply with the requirements of the Welfare Transition Program, and with the data entry requirements of the program's MIS, the One-Stop Service Tracking (OSST) system.

The Contractor will ensure that staff take a targeted approach to connecting WT customers with employment. This includes, but is not limited to, a work registration process that ensures an active, current EFM registration; the creation and maintenance of a marketable resume; the provision and recording of WP/WIOA services when appropriate; connection to Business and Employer Solutions' job opportunities; as well as job development and referrals to open and available positions.

The Contractor will be responsible for the WT program performance requirements established for the program. These include the WT Entered Employment Rate/Closed Case Outcome Rate, Employment Retention, and WT Participation Rate.

The Contractor will be responsible for ensuring that transitional WT customers with closed TANF cases who are receiving transitional benefits are followed up with no less than monthly. Follow-ups will be conducted to ensure that customers continue to maintain eligibility for benefits/support services and to request the appropriate documentation to reflect continued employment. Failure to conduct follow-up to

ensure customer's continued eligibility and failure to retain appropriate documentation in the customer's hard-copy or electronic file may result in disallowed costs if ineligible customers receive support services.

11. Supplemental Nutrition Assistance Program Employment & Training (SNAP E&T):

The Contractor will supply staff to engage recipients of food assistance benefits, who are referred from the Department of Children & Families (DCF) as Able-Bodied Adults without Dependents (ABAWDs) for mandatory participation, in allowable work activities/components and continued employment.

The Contractor will be responsible for the provision of case management services that comply with the requirements of the SNAP E&T program, and with the data entry requirements of the program's MIS, the OSST system.

The Contractor will ensure that staff take a targeted approach to connecting SNAP E&T customers with employment. This includes, but is not limited to, an initial engagement process that ensures an active, current EFM registration; the provision and recording of WP/WIOA services when appropriate; connection to Business and Employer Solutions' job opportunities; as well as job development and referrals to open and available positions.

Upon participation, the Contractor will ensure food assistance reimbursements are entered into OSST as defined by local guidance, eliminating the opportunity for disallowed costs.

12. Migrant and Seasonal Farmworker (MSFW):

The Contractor, in its role as oversight for DEO-funded employees/positions will ensure that the MSFW Outreach Specialist conducts outreach activities to the farmworkers of the CareerSource Capital Region service area, and as appropriate, Jackson and Liberty counties as well. The Contractor will also work with the Business & Employer Solutions staff at CareerSource Chipola to identify employers with open positions that may lead to employment opportunities for farmworkers in Jackson and Liberty counties. Further, the Contractor will ensure that the following activities are taking place on an on-going basis: recruitment, intake, and data entry of services related to those farmworkers who meet the federal definition of a migrant, seasonal, and/or food processing worker.

Although the MSFW Outreach Specialist is assigned to the Gadsden career center, the Contractor will ensure that at least one staff person in both the Leon and Wakulla career centers are trained on the requirements of serving MSFWs and serve as resources to other staff within their designated career centers.

The Contractor will ensure that the MSFW Outreach Specialist collaborates with community partners on issues affecting and involving the provision of services to farmworkers.

The Contractor will work with the Business & Employer Solutions team to identify potential agricultural and non-agricultural employers in Gadsden, Leon and Wakulla counties that may lead to opportunities of employment for farmworkers.

The Contractor will ensure compliance with the agreed upon duties and responsibilities for the MSFW Outreach Specialist position. The Contractor, in its oversight role, will ensure that the performance and equity of services is met for MSFWs based on federal, state and local guidance.

13. Priority Reemployment Planning (PREP):

The Contractor will be responsible for providing Florida’s reemployment services, Priority Re-Employment Planning (PREP). The Contractor will manage the PREP pool in accordance with state and local policy and schedule claimants for orientation services to include reporting no-shows to DEO. The Contractor will facilitate PREP Orientation in either a group setting or one-on-one and ensure that each attendee receives a one-on-one assessment subsequent to Orientation. Additionally, the following services will be made available for claimants to assist them with reconnecting to employment:

- Job search workshops
- Assessments
- Counseling
- Specific labor market information
- Referrals to education and/or training
- Assistance with navigating EFM

14. Veteran Services:

The Contractor will be responsible for the provision of services to veterans and oversight of the Disabled Veteran Outreach Program (DVOP) Specialists. The Contractor will be responsible for providing required program reports and for ensuring that Priority of Service is provided to veteran customers.

DVOP Specialists’ duties will be aligned to ensure their sole focus is on providing intensive-level services to veterans with Significant Barriers to Employment (SBE), or other veteran categories specified by the Secretary of Labor, in accordance with the roles and responsibilities outlined in federal and state guidance. Those veterans not meeting the SBE definition or not within a specified category identified by the Secretary are to be referred to other career center staff to receive career and/or training services, on a priority of service basis, in accordance with the veteran customers’ needs.

Intensive services by DVOP Specialists to the targeted population include, but are not limited to the following activities and services:

- Assessments
- Creating and maintaining a documented plan of service
- Counseling/group counseling and career/vocational guidance

- Referral of veterans to supportive or remedial services
- Referral to training
- Development of OJT training slots for Vocational Rehabilitation & Employment participants
- Referral to employment opportunities

The Contractor will be responsible for developing and maintaining an outreach plan designed to increase the number of SBEs served by the DVOPs. Once developed, the outreach plan will need to be submitted to CSCR's Regional Oversight, Performance and Compliance (ROPC) department for review, feedback and approval.

The Contractor will also ensure that an up-to-date network guide for services and resources available to veteran customers is created and maintained. This resource guide should be available for veteran customers and other staff. Additionally, the DVOP Specialists and other Career Center staff working with veteran job seekers should coordinate with the Local Veterans Employment Representative (LVER) to facilitate job matching and job development for veterans.

The Contractor is responsible for ensuring that the region's Intensive Services by DVOP Rate meets or exceeds 90% as evidenced by local tracking spreadsheets (as approved by the ROPC department) in conjunction with EFM Veteran Intensive Services Reports.

#### 15. Program Models

The Contractor will ensure that each program operated in the CareerSource Capital Region operating area has a documented program model. The Contractor will collaborate with the appropriate CSCR staff members during the development of each Program Model. Once developed, Contractor will evaluate the current program models and provide recommendations for ongoing program structure. Additionally, Contractor will utilize currently available reports and data to support ongoing program structuring.

The Contractor shall consult with the ROPC Department during program planning to ensure the models created align with the established vision of CSCR.

For the WIOA Youth program, the program model must also include an incentive structure that entails meaningful incentives designed to motivate the youth towards achieving their established goals and positive outcomes.

The Contractor and CSCR will ensure that each Program Model aligns with CSCR's 2016-2020 Strategic and Operating Plan. Where updates to the plan are required, CSCR will be responsible for making such updates.

#### 16. Work Experience/Internships/Transitional Jobs

Contractor will coordinate with the Business & Employer Solutions (BES) team in the development of work experience opportunities with public and private-sector agencies and businesses. The Contractor will provide staff to serve as the point of contact for

employers interested in engaging with the Work Experience/Internship program to include: outreach/site recruitment; advising employers regarding the work experience program; providing the necessary documents for their review, completion and/or execution; and advising them regarding other services available to them from the BES team. CSCR's BES team will serve as the point of contact for employer services related activities outside of the work experience/internship program and will offer support in the areas of employer registration, job order entry, etc. Additionally, the BES team will promote the Work Experience/Internship program to employers in the effort to support the work experience/internship program with identifying and securing work sites. The designated Contractor staff should also coordinate with BES to determine outreach efforts that may already be occurring by the assigned BES team representative to ensure a duplication does not occur. Both CSCR and Contractor will share feedback on outreach strategies to identify best practices.

Contractor will manage participant selection and placement at established work sites. Worksite selection will be based upon several criteria, and will include the worksite's ability to provide adequate supervision and the skills the participant will gain from the experience, at a minimum.

Contractor will complete a worksite agreement prior to the commencement of work experience/internship which will identify requirements for time and attendance records, evaluations and monitoring by the Contractor staff.

Contractor will deliver work site orientations with employers. Contractor will deliver orientations and workshops to participants to ensure preparedness for work experience/internship/transitional job opportunities.

Contractor will be responsible for managing payroll for paid work experience/internship sites and the overall management of the Work Experience/Internship Program(s).

17. On-The-Job Training

The Contractor will be required to coordinate with CSCR on the effective delivery of OJTs for employer and job seeker customers.

18. Special Grants and/or Contracts, and Workforce Services

Additional grants, contracts and workforce services may be obtained and provided by CSCR during the program year. The Contractor will be required to support CSCR in the administration/local management of these additional grants and contracts.

**F. Process Management Quality Assurance**

The Contractor will internally audit processes for Workforce Innovation and Opportunity Act, Wagner-Peyser, Supplemental Nutrition Assistance Program Employment & Training, Welfare Transition, Trade Adjustment Assistance, Migrant Seasonal Farmworker and special projects/grants program requirements.

The Contractor will regularly review existing workforce services policies, procedures and directives for continuing suitability as well as ensuring staff understands the requirements communicated through these documents. The Contractor will track and address any issues denoted in either internal or external quality assurance reviews where findings or other non-compliance issues result from staff's failure to follow current policy. The results and identified issues from the reviews will be submitted to CSCR on a quarterly basis.

The Contractor will coordinate with CSCR to create and update procedures, desk guides and forms to ensure that staff has access to the correct documents.

The Contractor will consult with CSCR on significant process changes that impact service delivery or programmatic operations to ensure both CSCR and Contractor expectations are incorporated prior to implementation.

#### **G. Coordination of Business and Employer Solutions (BES)**

Together, the Contractor and CSCR will establish an effective process for managing a supply-demand system in which the Contractor assists with the identification and preparation of the supply (job seeking customers) to meet the needs of local demand (employers). This process will include specific requirements tied to recruitment events, assisting employers with hard-to-fill positions, and ensuring the BES team is aware of the talents and skills of the local supply so that BES outreach efforts may be targeted with this information in mind.

The Contractor will establish and implement a process for determining the qualification of job seeking candidates prior to the issuance of job referrals. The goal is to significantly reduce the number of unqualified job seekers referred to employers.

The Contractor will assist CSCR in efforts to improve outreach to local employers. The Contractor will provide staff, as operations permit, to work with CSCR to leverage relationships with both local Chambers of Commerce and Economic Development organizations. The Contractor will provide staffing for the CareerSource Express (Mobile Unit) for public appearances, recruiting events, and skills upgrade training as scheduled by CSCR.

The Contractor will coordinate with CSCR to provide rapid response services to area employers and workers affected by temporary or permanent business layoffs. The Contractor will provide staff to serve as members of the Reemployment & Emergency Assistance Coordination Team (REACT).

##### **1. Job Order Management**

The primary job of all Contractor staff is getting people placed in the right jobs. Although CSCR's BES department will enter and maintain the job orders themselves, effective job order management also includes matching open jobs with skilled and qualified job seekers (job matching), job referrals and job placements. The BES department will establish regular communications with Contractor staff to transmit real-time information on employers' current needs for workers, labor market trends and



feedback from employers on services received from CSCR. The cooperative flow of information between CSCR's BES team and Contractor staff is vital to the success of CSCR's desired integrated service delivery model.

2. Job Matching and Job Placements

The Contractor will provide staff for job matching, job referrals, job placements and job development services. The designated Contractor staff must work as a unified team with CSCR's BES team in order to ensure optimal job matching services are provided. The goal of this unified effort is to ensure that each employer and job seeker are satisfied with the employment outcome. Effective job matching also requires staff to be skilled and knowledgeable about strategies and tools for establishing job seeker aptitude, skills, experience, interest and job retention.

The Contractor is responsible for providing job placement assistance to all job seeker customers who are enrolled in and receiving workforce services from Contractor staff. For customers who receive training services, the Contractor may be required to coordinate with the training provider's placement staff, providing the customer with job leads as well as job development.

#### H. Monitoring and Continuous Improvement

1. File Maintenance, Documentation & Timeliness of Data Entry

- a. The Contractor shall ensure that all customers' files, both hard copy and electronic, are up-to-date and accurate and contain all required documentation.
- b. The Contractor will ensure timeliness of data entry for all programs. For WIOA, the application must be entered within one business day of the date of application. Program exits must be entered within one business day of the date of the customer's exit. For all programs, Activities/Services (including follow-up services) and case notes shall be entered within two business days of services being rendered.

2. Quality Plan

The Contractor will develop and maintain a Quality Plan that provides guidance that will be used to monitor the quality of programs and services provided by CareerSource Capital Region. Contractor staff will ensure that CSCR staff input is sought and incorporated prior to finalization. The plan will be created annually, and Contractor and CSCR will review the plan semi-annually to ensure adjustments are made as needed to address identified monitoring trends or changes in organizational needs.

3. Monitoring Schedule

- a. Reviews by program will take place in accordance with the monitoring methodology identified by CSCR, DEO and USDOL. Contractor shall respond in writing to monitoring reports and requests for corrective action plans within ten (10) working days after the receipt of the monitoring report from CSCR.

- b. Contractor shall institute a system for monitoring fiscal, participant and program activities for compliance with the Contract.
  - c. The Contractor will conduct at a minimum monthly program reviews for all program areas and special projects/grants. The results from the reviews will be submitted to CSCR by the 10<sup>th</sup> day of the month following the review conducted.
  - d. The Contractor will maintain documentation to verify completion of all monitoring activities.
  - e. The Contractor will trend and analyze monitoring data for reporting to CSCR on a quarterly basis via the quarterly report submitted to CSCR by Contractor.
  - f. Contractor shall ensure that all staff responsible for program compliance receive appropriate grant administration and program compliance training.
4. Program Areas to be Reviewed  
Welfare Transition, WIOA (Adult, Dislocated Worker and Youth), Wagner-Peyser, MSFW, Veterans, SNAP E&T, PREP, and Special Projects/Grants.
5. Monitoring Tools  
CSCR has adopted DEO's current review tools with the addition of placement-related review items. Copies of tools will be made available to the Contractor prior to the actual review. Any changes made to the state monitoring review tools will be adopted and implemented at CSCR's level.
6. Linkage to Training & Development  
The Contractor will ensure an appropriate linkage between quality and training staff to ensure that formal and informal corrective action plans incorporate appropriate staff training. Additionally, as local quality assurance reviews occur at both the Contractor and CSCR levels, it is important that communication occurs with the Regional Oversight, Compliance and Performance department to ensure consistencies between monitoring outcome reporting, trending and identification of training needs.
- Training conducted as a result of federal, state or local quality assurance reviews (whether one-on-one or in a group setting) must be documented in writing and recorded electronically utilizing the designated software or system.
7. Monthly Operations Review  
The Contractor will participate in regular meetings of the local Operations Management Team to review contract items, processes, customer and performance data, the results of internal quality assurance monitoring and corrective action efforts.

The operations management team will include designated members of both the Contractor and CSCR's leadership team.

#### 8. Continuous Improvement

The Contractor shall establish and maintain reliable mechanisms that will immediately identify when a problem occurs, (administrative or programmatic), and when corrective action is necessary. This continuous improvement process shall include, but is not limited to the following:

- a) Automation – The Contractor shall use automation whenever and wherever possible to deliver services. The Contractor will use all features of Atlas, and the FLORIDA, OSST, and EFM systems, and ensure ongoing training in the use of these systems to provide integrated service delivery. The Contractor shall also explore other uses of technology to continue to improve service delivery.
- b) Tracking Effectiveness – The Contractor will track effectiveness using monitoring data, state reporting data, customer feedback (client and employer focus groups and survey results), and feedback from the general public. The Contractor shall also conduct at least a monthly review and analysis of the data to identify trends, issues, etc.
- c) Performance Evaluation – The Contractor shall continuously evaluate its performance and the overall success of the workforce development service delivery system. This shall include a comprehensive analysis of both financial and performance aspects of the Contractor's operation.

#### I. Financial and Administrative Expectations

The Contractor will provide financial staff that has experience in managing and accounting for multiple funding sources. The Contractor will have internal controls in place to ensure the entire system is consistent and responsible.

The Contractor understands and affirms that there can be no supplanting or co-mingling of funds received through the Contract. All funds will be traceable to the appropriate workforce grant and will be necessary and allowable.

The Contractor understands and affirms that any revenues above costs that are generated through the use of funds must be reported and returned to CSCR.

The Contractor will follow procurement guidelines issued by Federal, State and CSCR authorities.

#### J. Reporting

The Contractor will provide CSCR with a monthly report that includes data from all operations of the career centers in Gadsden, Leon, and Wakulla counties as outlined in the Contract. Additionally, Contractor will provide a quarterly report that summarizes the activities of all operations of the career centers in Gadsden, Leon and Wakulla Counties.

The design and structure of the quarterly report will be determined by CSCR CEO and the ROPC department. The quarterly report must be provided to CSCR in accordance with the timeline outlined in the Contract.

The Contractor will work with CSCR to establish a schedule and format for fiscal reporting.

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## VII. RESPONSE SUBMITTAL

### A. Responsive Proposals

To be considered responsive, proposals must meet the following minimum criteria:

- 1) Two (2) original proposals, eight (8) copies and an electronic version must be received by the CareerSource Capital Region Administrative office by **no later than the due date and time shown in the Procurement Timetable of this RFP**. The timely delivery of a proposal is entirely the responsibility of the Respondent. Proposals postmarked on or before the proposal due date but delivered after the due date or time will be considered non-responsive. Proposals hand delivered after the due date or time will be considered non-responsive. Proposals that do not have all required attachments and do not follow length guidelines will be considered non-responsive.
- 2) Proposals are limited to 35 pages. Note: Attachments and required forms are not included in this page count. Each section must begin on a new page and be clearly identifiable.
- 3) Must be printed single-sided on 8.5” x 11” paper with 1” margins on each side using a 12-point font.
- 4) Each page (except the cover sheet) must be sequentially numbered at the bottom of each page.
- 5) The original proposals must be manually signed in blue ink by an official authorized to represent and bind the proposing agency and should be marked “original”.
- 6) Proposals must be presented in the same order as set forth in “Proposal Outline and Format” section below and contain all requested information.
- 7) Giving incomplete or erroneous information or withholding important information could result in disqualification or, later, contract termination.
- 8) Respondents must demonstrate a general understanding of the service delivery system, the services solicited by this RFP and the ability to effectively and efficiently manage and deliver those requested services.

CareerSource Capital Region will not return proposals, binders or exhibits to Respondents. All proposals become the property of CareerSource Capital Region and will be a matter of public record subject to the provisions of Chapter 119, Florida Statutes. CareerSource Capital Region shall have the right to use all ideas, or adaptations of those ideas, contained in any proposal received in response to this RFP without the necessity of paying a fee, license, or royalty. Selection or rejection of the proposal will not affect this right.

## B. Proposal Outline and Format

All proposals must be assembled according to the following outline:

**1. Cover Page – use Attachment A**

**2. Organizational Background – use Attachment B**

**3. Proposal Abstract/Executive Summary**

- a. Provide a description of your organization to include its mission, vision and values.
- b. Demonstrate an understanding of the workforce development system in Florida.
- c. Outline key organizational achievements within the past three (3) years.
- d. Briefly describe why your organization is seeking award of this RFP and any unique or innovative aspects that may set your organization and/or your response apart from others.

**4. Proposal Narrative**

Clear, thorough, concise answers are preferred rather than overly verbose narrative that does not provide a specific response. Get to the point as quickly and completely as possible. Do not repeat statements or ideas within the text of the proposal. Referring the reviewer to another section of the proposal for other information is preferred rather than repeating the information.

a. Organizational Experience / Capabilities

Describe the proposing organization's experience in providing the services proposed and the organization's capabilities to deliver the proposed services by thoroughly responding to the following.

1. Describe your organization's experience in managing and delivering each of the workforce development programs and services outlined in this RFP in a One-Stop career center environment. Be sure your response clearly articulates the states and timeframes in which services were managed and delivered.
2. Expound upon your organization's experience outlined above by providing specific data on performance outcomes achieved to demonstrate the organization's ability to meet contractual performance standards. Note: The information should be provided in table format and include the goals set (either through a contract, plan, or policy) and provide verifiable performance achievement data against those set goals. Examples of the types of goals being requested include, but are not limited to: federal, state or local performance measures; training completion rate; job placement rate; average wage at placement; job retention rate; cost per placement; participation rate(s); job seeker satisfaction rate, etc. Provide this information for each of the programs mentioned in "a" above for each contract held in Florida and in other states during the past three (3) years. Provide a contact person, phone number and email address for each such contract. Note: the expectation is that the

Respondent furnishes performance information for all programs for every state where the Respondent has provided services (identified as **Attachment C**).

3. Describe your organization's experience with operating a programmatically integrated service delivery model that has the needs of business and industry at the core of your operations.
  4. Describe your organization's financial and administrative experience and capabilities. Include in that description experience in managing and accounting for multiple federal, state and local funding sources in accordance with GAAP.
  5. Describe your organization's experience conducting self-monitoring for contract performance and compliance.
  6. Describe your organization's experience with developing and implementing a continuous improvement model.
  7. Describe your organization's experience in managing and providing value added One-Stop services that benefit employers. Include in that description experience in: 1) matching the hiring needs of employers with individuals who meet their minimum qualifications, thus eliminating referrals of unqualified candidates; 2) job matching activities; and 3) determining job seeker work readiness.
  8. Describe your organization's experience with functionally supervising staff who are employed by another organization.
  9. Describe any industry-recognized quality certifications held by your organization and provide a brief narrative describing each. Additionally, describe the integration of your quality certification and processes into your service delivery model. A copy of any issued certificates should be included reflecting current standing. (Do not include certificates that are no longer active).
- b. Strategy
- Respondents must outline the following strategies for how they intend to deliver the workforce development services outlined in the Scope of Work:
1. Identifying and implementing collaborative strategies with any mandated partners that demonstrate a seamless referral system and coordinated service delivery (to ensure services are not duplicated by partnering organizations).
  2. Providing excellent customer service to job seeker customers as well as measuring customer satisfaction.

3. Orienting customers to the array of services available to them.
4. Delivering assessments as part of a comprehensive initial assessment process. Please also include a description of your overall assessment process (to include which tools are utilized) and how it coincides with the effective creation of employment plans.
5. Developing, maintaining and presenting curriculum that emphasizes core values and instills meaningful work ethics, employability skills, job readiness/job search skills and interview techniques, and your ability to modify/adjust those services as needed, based upon feedback from area employers.
6. Attracting a sufficient number of job seekers to ensure the contractual requirements are met. Further, identifying and recruiting job seekers who may be viable candidates for job postings but who are not engaged with the workforce system.
7. Ensuring customers are effectively able to utilize Florida's online labor exchange system (Employ Florida Marketplace) and enhancing their job search resources and skills.
8. Operating a service delivery model that increases wages and reduces the period of unemployment for job seekers.
9. Delivering services to customers with barriers to employment.
10. Managing the TAA program (include references to prior experience and performance).
11. Managing WIOA service delivery processes that include the provision of basic and individualized career services as well as training services in accordance with WIOA and the associated regulations. As part of the strategy, include how the Respondent intends to:
  - a) Attract a sufficient number of eligible Adults and Dislocated Workers.
  - b) Ensure appropriate enrollments based on both eligibility and suitability.
  - c) Ensure appropriate expenditure levels of training dollars.
12. Managing the provision of outreach, recruitment, enrollments, assessment and case management activities for WIOA youth participants. Note: When outlining your strategy, include the number of youth your organization has served and correlating performance data. Also, identify the key features of your product and its comparative advantages over products offered by competitors designed to achieve the same performance objectives. As part of the strategy, include how the Respondent intends to:



- a) Attract a sufficient number of eligible Youth.
  - b) Ensure appropriate enrollments based on both eligibility and suitability.
  - c) Deliver a year-round youth work experience program (to include prior experience managing an equivalent or similar program).
13. Providing creative and innovative follow-up services, for one year post-exit, that help program completers maintain employment.
  14. Engaging customers consistently and utilizing a consultative approach to case management.
  15. Engaging WT and SNAP E&T customers in countable work activities. As part of the strategy, include how the Respondent intends to:
    - a) Ensure appropriate pre-penalty and sanctioning processes are followed timely.
    - b) Recruit and develop Community Work Experience sites that address the career interests of customers as well as provide marketable and transferable skills.
    - c) Take a targeted approach to connecting WT/SNAP E&T customers with self-sufficient employment.
    - d) Provide services to help customers retain employment and not return to public assistance.
  16. Managing the MSFW program (include references to prior experience and performance).
  17. Managing the PREP program.
  18. Managing services to Veterans. As part of the strategy, include how the Respondent intends to:
    - a) Ensure priority of service is given to eligible veterans and spouses.
    - b) Establish a service delivery model that ensures DVOP Specialists only work with veterans with SBEs.
    - c) Develop effective outreach methods/strategies.
    - d) Meet the required Intensive service rates by DVOP Specialists.
  19. Establishing creative methods to programmatic operations. In your response, provide examples of program models the Respondent has operated in other contracts for any of the workforce development services solicited in this RFP.
  20. Operating work experience/transitional jobs/internship program for eligible customers in coordination with the BES team. As part of the strategy, include how the Respondent intends to:
    - a) Develop meaningful, targeted worksites

b) Recruit employer partners

Note: Please share any prior experience with serving as the employer of record for work experience programs (or special projects/grants) and any associated successes.

21. CareerSource Capital Region believes that On-the-Job Training (OJT) can be a major component in the local scheme for serving employers and job seekers, alike. Please describe your organization's past experience in providing and/or overseeing OJT-related activities. Furthermore, please describe your organization's experience with and its approach to coordinating, overseeing and providing customized training activities related to employer workforce requirements.
22. Managing (or supporting CSCR in managing) special grants/projects. Note: the response should include strategies tied to staffing or functionally supervising special grant staff hired directly by CSCR as well as performing to meet the stated deliverables.
23. Ensuring programmatic compliance as well as effective process management through quality assurance processes.
24. Establishing and maintaining a continuous improvement process that includes data collection, reporting, data analysis and corrective action mechanisms to ensure that performance goals are achieved.
25. Establishing (together with CSCR) an effective process for managing a supply-demand system in which the Contractor assists with the identification and preparation of the supply (job seeker customers) to meet the needs of local demand (employers). As part of the strategy, include how the Respondent intends to:
  - a) Ensure the provision of quality job referrals.
  - b) Identify the role the organization sees itself being in with supporting CSCR to meet the needs of local employers.
  - c) Be effective with job matching and job placements
  - d) Maximize employer recruitment events coordinated by the BES team.
26. CareerSource Capital Region considers customized training – i.e., Employed Worker Training (EWT) to be viable tools for assisting area employers with upgrading workforce skills and remaining competitive within their industries. Please detail your organization's past experience in providing and/or overseeing EWT activities.

c. Staffing

As further explained in the Key Provisions subsection of this RFP, The Contractor will be required to hire and manage qualified and trained staff who have the required skillset and technical expertise to ensure the goals, objectives and requirements of this RFP are met. The experience, abilities and motivation of the staff play a critical role in the ultimate success of the service delivery.

1. **Key Staff** - Describe how key One-Stop Career Center leadership will be selected and assigned to this Contract and provide copies of their resumes with the proposal (as **Attachment D**). For positions where the key person is not known, a job description may be submitted in place of the resume. In preparing your response, please consider the attributes required by the key individuals who will have the most responsibility for shaping your product, connecting it to the customer, and achieving performance. Focus on enthusiasm, skills, knowledge, and commitment. We are most interested in:
  - a) The names and job titles of the key staff that will be in LWDA 5 and assigned to work on this project or, if not known, key staff job titles and how such staff will be selected;
  - b) Why these specific individuals or, if not known, job titles are critical to project success;
  - c) If a team approach to management is planned, how the strengths of these key individuals are complementary and not duplicative; and
  - d) The further assistance and expertise that will be made available by your organization to support these key individuals.
2. **Career Specialists/Career Consultants** - Based on your staffing chart, identify the number of career specialists/career consultants and their estimated caseload (do not include managerial, supervisory or support personnel in these estimates). In preparing your response, be specific about the steps your organization will take to reassign personnel in the event caseload numbers exceed your estimate.
3. What will be done to ensure consistency of operation in lieu of the fact that there will always be some turnover among staff members.
4. What will be done to instill a professional culture, a sense of accountability, and to align individual efforts toward common goals and objectives.
5. **Staff Development** - Staff development is vital to the success of all CSCR services. Qualified staff exhibit enthusiasm, capability and commitment to customers, as well as demonstrated commitment to their own professional development. Further, each Respondent will be required to submit a comprehensive staff development training plan to:
  - a) Describe the Respondent's staff development plans. Specifically, include plans for delivering information technology training, case management,

program policy, customer service, and management/supervisory training. Specify for each type of training the duration and the frequency.

- b) Describe plans for an ongoing training program that focuses on ensuring that all staff acquire the basic competencies of their positions and are kept abreast of all new information and processes in a timely manner. Specify for each type of training, the duration and the frequency.
- c) Describe how new hires are on-boarded to include targeted training relative to their position.
- d) Describe plans for compliance with CareerSource Florida and the Department of Economic Opportunity's requirements for One-Stop Credentialing including the Respondent's plan for staff to meet the initial certification requirements as well as the subsequent 15-hour Continuing Education Credits per year.

Further, it is vital that the Respondent has administrative management capabilities required to attract and maintain appropriate staff. Respondents must have in place, or agree to establish Personnel, Grievance, Travel, and Equal Opportunity/Nondiscrimination Policies; Job Descriptions; and Performance Management or Individual Development Plan. Respondent will provide copies of established policies and plans listed above as attachments to this proposal (as part of **Attachment E**).

d. Transition Plan

An "investment" will be required of any Contractor; that investment being uncompensated time and effort in training new staff, transitioning from the current Contractor to a newly selected organization in order for services to begin with no interruptions on July 1, 2016. Describe how the Respondent will deal with this investment in order to conduct an orderly transition from the current One-Stop provider and deliverer of services to ensure that there is no disruption in services or negative impact on our customers. Detail the action steps, strategies and time lines with specific dates for transitioning the services requested under this RFP. This should be presented in table format.

e. Performance Outcomes

Describe how these outcomes will be achieved. Explain your organization's approach to meeting performance standards and how you intend to document, track, validate and report performance outcomes. Provide an assurance that you are committed to achieving the minimum performance levels indicated including an assurance that your organization will provide a performance and production matrix consistent with CareerSource Capital Region's directive prior to execution of the Contract. Identify any enhanced levels of performance your organization is committed to produce for each of the measures referenced. Clearly describe why your organization believes achievement of these enhanced levels is possible. Do not propose units of service (i.e. counseling will be provided to 100 clients).

#### 4. Budget Narrative

A detailed line item budget must be submitted on the attached Budget forms **(Attachments F & G)**. Costs included in the proposed budget cannot already be paid by another source; they must be actual costs incurred in delivering the proposed services, and these funds cannot supplant funds already received by the Respondent.

- a. Provide a budget narrative that justifies each proposed expense included on the budget forms in terms of it being necessary, allowable and reasonable. Show the method of computation.
- b. Give details of the organization's Indirect Cost Rate Plan, overhead and allocated costs. For example, prorating the cost of supplies based on the number of staff, or the cost of salaries based on percentage of time spent on the Contract.
- c. Identify any in-kind resources/support for the service delivery system beyond what is requested in the budget. Include each committed or proposed source of funding and the amount of that funding.
- d. State what contingency plans are in place to repay CareerSource Capital Region in the event that there are any disallowed costs as a result of an audit or monitoring review. State how the Respondent will repay (i.e., performance bond, etc.) welfare transition program funding that may be lost to LWDA 5 if the Respondent's performance results in low participation rates.
- e. Describe how the Respondent will financially support the costs of doing business until an invoice can be submitted and paid by CareerSource Capital Region. Note, no advance payment will be made.
- f. If the proposed cost reimbursement contract has a demonstrated performance holdback, provide the proposed percentage of the total cost that will be withheld (minimum is 15%) until measurable performance outcomes are achieved and documented. Describe the measurable performance outcomes to which the Respondent proposes to tie payment and the documentation that will be submitted to prove attainment of the outcome.
- g. If funded, what percentage of the proposing agency's total budget will this contract represent?
- h. Describe how the Respondent will budget and spend a minimum of 85% of the total cost of the contract on direct program costs. Describe any indirect, overhead and allocated costs that are proposed, how the indirect was determined, and what general costs are included in the rate. If indirect costs are included in the budget, the Respondent must have an approved indirect cost rate. Provide a copy of the indirect cost rate approval letter and the approved rate.

- i. What system will be in place for the tracking of ITA, support services, ancillary services, incentives, obligations and expenditures? How will this system be managed?

In preparing the budget, Respondents should take into consideration that CareerSource Capital Region will directly pay for facility costs (rent, utilities, phones), equipment (copiers, desks, chairs, tables), information technology (data lines, network development and maintenance, hardware, software, technical support), customer training (tuition, books, uniforms, OJT employer reimbursements, customized training costs), support services for customers (child care, transportation, car repair), and the majority of marketing costs (name recognition media buys, resource room supplies and information pieces, signage, assistance with other brochure development). Therefore Respondents should not include costs for such expenses in the budget submitted with the proposal.

All proposals will be evaluated on the basis of cost-effectiveness in relation to high quality service delivery. To accomplish this, CareerSource Capital Region staff shall conduct an analysis of proposed costs during the proposal review process. Respondents are therefore encouraged to submit their best offer for providing the services solicited in this RFP and to thoroughly describe and justify the proposed costs. This analysis shall be conducted to ensure that the proposed costs are necessary, fair and reasonable; to determine if the proposed costs are allowable and allocable; to determine if there is no duplication of costs with other programs; to ensure that the costs are directly associated with carrying out only the proposed services; and to ensure that the proposed costs will benefit the workforce development delivery system.

**5. Administrative and Financial Capabilities Checklist [use Attachment H]**

**6. Mandatory Additional Attachments**

Attachment I	Assurances
Attachment J	Instructions for Debarment & Suspension and Other Responsibility Matters Certification
Attachment K	Certification Regarding Lobbying, Certification for Contracts, Grants, Loans and Cooperative Agreements
Attachment L	Insurance Certification
Attachment M	Drug-Free Workplace Certification
Attachment N	Non-Discrimination Certification
Attachment O	Sworn Statement of Public Entity Crimes (Pursuant to Section 287.133(3)(a))
Attachment P	Conflict of Interest Statement
Attachment Q	Audit Requirements

### C. Conditions Applicable to All Proposals

The following conditions are applicable to all proposals:

1. Proposals submitted after the date and time stated on the proposal timeline will not be considered. It is the respondent's responsibility to insure that their proposal meets all submission requirements.
2. Respondents are subject to applicable equal employment opportunity requirements. CareerSource Capital Region reserves the right to request copies of your latest Equal Employment Opportunity reports.
3. If a Respondent wishes to submit a proposal in collaboration with other partners to provide components of the activity areas, only one proposal shall be submitted. An example to demonstrate the collaboration may be in the form of an interagency agreement.
4. No proposal will be considered if:
  - a. The entity has been disbarred by an action of any governmental agency; or
  - b. The entity's previous contracts with Region Five have been canceled for cause; or
  - c. The entity has not complied with an official order of any agency of the State of Florida or the United States Department of Labor to repay disallowed costs incurred during its conduct of projects or services; or
  - d. The entity has any record of public entity crimes; or
  - e. For any cause such as pending litigation or if the Respondent is determined irresponsible
5. By submission of this proposal, the Respondent certifies that in connection with this proposal:
  - a. The fees or costs in the proposal have been arrived at independently without consultation, communication, or agreement with any other Respondent, or with any competitor for the purpose of restricting competition, as to any matter relating to such fees; and
  - b. No attempt has been made or will be made by the Respondent to induce any other person or firm to submit a proposal for the purpose of limiting or restricting competition.
6. Each person signing the proposal certifies that:
  - a. He/she is the person in the Respondent's organization legally responsible, within that organization, for the decision as to the prices or costs being offered in the proposal and that he/she has not participated in any action contrary to (a) and (b) above; or
  - b. He/she is not the person in the Respondent's organization legally responsible, within that organization, for the decision as to the prices or costs being offered in the proposal; however, that he/she has been duly authorized in writing, with a copy attached, to act as agent for the persons legally responsible for such decision, and certifies that such persons have not participated, and will not participate, in any action contrary to (a) and (b) above.

7. Service providers must maintain a drug-free workplace for employees and customers.

## VIII. SELECTION

CareerSource Capital Region maintains a policy that an organization must possess the demonstrated ability to perform successfully under the terms and conditions of a proposed contract prior to the contract being executed. Determinations of demonstrated performance shall take into consideration such matters as to whether the organization has:

- Adequate financial resources or the ability to obtain them.
- The ability to meet the RFP design specifications at a reasonable cost, as well as the ability to meet performance goals.
- A satisfactory record of past performance in delivering the proposed services, including demonstrated quality of services and successful outcome rates from past programs.
- The ability to prioritize and provide services and/or a program(s) that can meet the need identified.
- A satisfactory record of integrity, business ethics and fiscal accountability.
- The necessary organization, accounting and operational controls.
- The technical skills to perform the work.
- Is in alignment with CareerSource Capital Region’s mission, visions, and values.

### A. Proposal Review and Contract Award

Proposals will be initially reviewed and rated by a formed CareerSource Capital Region review team using a point system based on a Proposal Evaluation / Rating Form. The review team will prepare a proposal-rating summary for review by the Board and/or one of its committees. Proposals will then be evaluated by appropriate Board members. Prospective providers may be invited to make oral presentations and /or explain their proposals.

A contract may be awarded based on offers received, without discussion of such offers with the Respondents. Each offer should, therefore, be submitted in the most favorable terms, from a price and technical standpoint that the offer can make. However, the review team reserves the right to request additional data, oral discussion or presentation in support of written proposals.

Final award of a contract will be contingent upon:

- Successful negotiation of a contract
- Acceptance by the Respondent of the contract terms and conditions
- Satisfactory verification of past performance and systems (e.g., financial), where applicable
- Availability of funding



## B. Appeal Procedure

In accordance with applicable regulations, Respondents who are denied funding have the right to appeal. The following steps must be taken for organizations to appeal funding decisions:

1. Submit a letter within three (3) business days from the date of the contract award to the Chief Executive Officer of CareerSource Capital Region stating that an appeal to the contract award is being filed and the specific reasons for that appeal based on the four criteria below:
  - a) Clear and substantial error or misstated facts by the review team upon which the decision was made by the Board of Directors
  - b) Unfair competition or conflict of interest in decision making process
  - c) Any illegal or improper act or violation of law
  - d) Other legal basis on grounds that may substantially alter the Board's decision

The Chief Executive Officer will review the appeal and respond within 10 business days.

2. In the event the Chief Executive Officer's response is not satisfactory to the Respondent, an appeal to the CareerSource Capital Region Executive Committee may be requested. The request must be addressed in writing within 15 days from receipt of response from CareerSource Capital Region to:

CareerSource Capital Region  
Attention: Board Chair  
325 John Knox Road, Atrium Building – Suite 102  
Tallahassee, Florida 32303

The appeal will be heard at a time set by the Chair of the Board of Directors after consultation with legal counsel.

## C. Conditions of this RFP

This Request for Proposal does not commit or obligate CareerSource Capital Region to award a contract, to commit any funds identified in this RFP document, to pay any costs incurred in the preparation or presentation of a proposal to this RFP, to pay for any costs incurred in advance of the execution of a contract, or to procure or contract for services or supplies.

Further, CareerSource Capital Region reserves the right to:

1. Accept or reject any or all proposals in whole or in part, which it considers not to be in its best interest. No guarantees, expressed or implied, are made by CareerSource Capital Region or its agents as to the availability of funds.

2. Change or waive any provisions set forth in this RFP.
3. Return non-conforming proposals without review.
4. Waive informalities and minor irregularities in proposals received.
5. Negotiate any and all proposed terms, conditions, costs, staffing level, services/activities mix, and all other specifics.
6. Request a) additional data, b) technical or price revisions, or c) oral presentations in support of the written proposal.
7. Determine that an arms-length agreement exists between the Respondent and any subcontractors or vendors they might choose to use.
8. Require the establishment of escrow accounts for a Contractor that currently has outstanding debts to CareerSource Capital Region as a result of audits or monitoring reviews.
9. Conduct a pre-award review that may include, but is not limited to, a review of the Respondent's record keeping procedures, management systems, accounting and administrative systems, and program materials.
10. Change specifications and modify contracts as necessary to (a) facilitate compliance with the legislation, regulations and policy directives, (b) to manage funding and (c) to meet the needs of the customers.
11. End contract negotiations if acceptable progress, as determined by CareerSource Capital Region, is not being made within a reasonable time frame.