



## Competitive Proposal (CP) for Management of Subsidized Wages

RFP Issued	Due Date
Respondents Orientation	October 11, 2019
Last Day to Submit Questions	October 15, 2019
<b>Proposals Due</b>	<b>October 18, 2019</b>
In-Person Interviews	October 22, 2019
Anticipated Award Notification	October 23, 2019
Contract Start	November 1, 2019

Proposal must be received no later than  
**5:00 P.M. PACIFIC TIME**  
**OCTOBER 18, 2019**  
ABSOLUTELY NO EXCEPTIONS

The San Diego Workforce Partnership is an equal opportunity employer and is committed to equal opportunity in its contracting process. Auxiliary aids and services are available upon request to individuals with disabilities.

# CP for Management of Subsidized Wages

## TABLE OF CONTENTS

I.	Introduction and Scope of Work.....	3
A.	Purpose of RFP.....	3
B.	Scope of Work.....	3
C.	Contract Period.....	5
D.	Organizational Overview & Governance .....	5
E.	Eligible Applicants .....	5
F.	Addenda to this RFP .....	5
G.	Right to Cancel .....	6
H.	Submittal of Proposal .....	6
I.	Questions and Answers about the RFP .....	6
J.	Respondents Orientation.....	6
II.	Proposal Submission .....	7
A.	Cover Page.....	7
B.	Proposal Narrative.....	7
1.	Organizational Qualifications and Project Management.....	7
2.	Fiscal Qualifications.....	7
C.	Pricing sheet.....	8
D.	In-Person Interview.....	8
III.	Evaluation Criteria and Contract Award .....	8
A.	Evaluation Criteria and Access to Evaluation Information.....	8
B.	Contract Award.....	9
1.	Negotiation/Contract .....	9
2.	Cooling off period.....	9
C.	General Provisions .....	10
1.	Contract Terms, Insurance and Litigation Warranty .....	10
D.	Appeal Process .....	10
E.	Restriction on Disclosure.....	10
IV.	Other.....	11
A.	Service Agreement Template .....	11
B.	Conflict of Interest.....	11
V.	Referenced Attachments .....	11

## I. INTRODUCTION AND SCOPE OF WORK

### A. PURPOSE OF RFP

In addition to the programs managed by the San Diego Workforce Partnership (“the Workforce Partnership”) and delivered by its subrecipients, the Workforce Partnership is funded by a variety of governmental and philanthropic funding sources to deliver program services directly to job seekers in the San Diego region. A number of these programs include internship, on-the-job training, or other subsidized wage activities. For most of these activities, the Workforce Partnership pays training wages to job seekers.

The purpose of this request is to procure a qualified service provider for subsidized wage management services through June 30, 2020, with the option to extend the agreement for two additional one-year periods.

### B. SCOPE OF WORK

The San Diego Workforce Partnership (the Workforce Partnership) seeks to procure subsidized wage management services.

The successful bidder will be required to:

1. Serve as employer of record for job seekers in subsidized wage activities related to the Workforce Partnership’s direct service programs
2. Manage I-9 documentation/E-Verify processes (as appropriate) for such job seekers
3. Maintain approved work permits for minor job seekers
4. Pay the employer’s portion of all payroll taxes—including Federal Insurance Contributions Act (FICA), Unemployment Insurance (UI) and State Disability Insurance (SDI)—in a timely manner
5. Secure worker’s compensation insurance and general liability insurance to cover payrolled job seekers, and pay for such insurance in a timely manner
6. Manage all requisite employee training and policies for job seekers (e.g. mandatory sexual harassment training; injury and illness prevention programs)
7. Compensate job seekers in a timely manner
8. Maintain appropriate controls with regard to the security of records and of payments
9. Execute any responsibilities of an employer not specifically delegated to the Workforce Partnership
10. Provide the Workforce Partnership with a distinct invoice for each role being billed (i.e. one invoice containing all Tech Interns, another containing all Retail Interns, and so on) representing reimbursable costs for wages and fees for management/administration, and invoice the Workforce Partnership in a timely manner
11. Provide the Workforce Partnership with a payroll journal containing the following for each payroll period for each job seeker:
  - a. Employee name/employee ID
  - b. Role and PO Number (provided by Workforce Partnership)
  - c. Gross pay
  - d. Deductions and withholdings
  - e. Net pay
  - f. Check number, direct deposit confirmation, or other confirmation of payment

For each of the following components of service delivery, respondents should select from the given options which approach they will use. The particular selection made by a bidder will not impact bid evaluation, and bidders are encouraged to choose the options which lead to the most cost-effective bid overall. Each bidder may choose to:

1. Task its own staff with the authorization of minor work permits and/or delegate Workforce Partnership staff to authorize minor work permits
  - a. Bidders selecting to task only their own staff with the authorization of minor work permits must have staff available for such purpose in all four of the Workforce Partnership's regions (north, south, east and metro).
2. Task its own staff with the verification of I-9 documentation and/or authorize Workforce Partnership staff to verify I-9 documentation
  - a. Bidders selecting to only task their own staff with the verification of I-9 documentation must have staff available for such purpose in all four of the Workforce Partnership's regions (north, south, east and metro).
3. Run a weekly or biweekly (every other week) or semi-monthly (twice per month) payroll cycle
4. Invoice the Workforce Partnership either after each payroll cycle or once per month
5. Allow job seekers to select between check and direct deposit for payment of wages and/or allow job seekers to select between payroll card and direct deposit for payment of wages
6. Select either of the following processes for timesheet submission
  - a. Bidder receives final timesheets as Excel or .CSV files via email or by directly downloading them from the Workforce Partnership's case management platform.
    - i. In this scenario, job seekers would complete timesheets using the Workforce Partnership's online portal, and timesheets would be approved by case managers using the same online system.
    - ii. There are no costs to bidders inherent to the use of this system. Bidders are responsible for ensuring they are prepared to transfer this data to their payroll systems as needed.
  - III. Sample timesheet reports from this system may be found in **ATTACHMENT – SAMPLE EXCEL TIMESHEET REPORT** and **ATTACHMENT – SAMPLE CSV TIMESHEET REPORT**.
  - b. Bidder provides a timekeeping system.
    - i. This system must allow for the online submission of timesheets and for timesheets to be approved online by the job seeker's case manager.
    - ii. A successful bidder proposing this method will be required to generate a report containing copies of job seeker timecards for each pay period. Timecards must include:
      1. Pay period
      2. Job seeker name and/or case number
      3. Job seeker role
      4. Number of hours worked each day
      5. Total hours worked in the pay period
      6. Job seeker's electronic signature and date
      7. Case manager's electronic signature and date

The Workforce Partnership expects to maintain responsibility for the condition of worksites and for compliance with wage and hour laws.

While it is not possible to guarantee a specific amount of job seekers, hours or wages the Workforce Partnership will require under this procurement, the below table represents an estimate based on the organization’s projected subsidized wages for the entirety of the current fiscal year. This includes both job seekers payrolled by our current vendor and those to be payrolled by the successful bidder. In the end, the number of job seekers patrolled by the successful bidder in fiscal year 2020 will be dependent on how quickly the successful bidder can set up services. The Workforce Partnership does not expect to fund any more than \$700,000 in job seeker payroll in any given year.

Role	Job seekers	Hourly wage	Hours	Total
Tech Sector Intern	125	\$ 15.00	150	\$ 281,250
Office Intern A	85	\$ 13.00	150	\$ 165,750
Office Intern B	100	\$ 13.00	60	\$ 78,000
Office Intern C	105	\$ 12.50	20	\$ 26,250
Retail Intern	25	\$ 12.50	50	\$ 15,625
<i>Total/Average</i>	440	\$ 13.20	86	<b>\$ 566,875</b>

### C. CONTRACT PERIOD

The Workforce Partnership intends to award one contract with a base year that will begin on November 1, 2019 and end on June 30, 2020, with the option to extend the agreement for four additional one-year periods based on organizational need, service provider performance, and funding availability.

### D. ORGANIZATIONAL OVERVIEW & GOVERNANCE

The Workforce Partnership is a 501(c)(3) tax-exempt organization chartered by the County and the City of San Diego to fund job training programs in the San Diego region. The organization’s primary funding is allocated by the U.S. Department of Labor (DOL) under the provisions of WIOA and is overseen under the leadership of the Workforce Development Board (WDB) and the Policy Board. For additional information on the Workforce Partnership, visit [workforce.org](http://workforce.org).

### E. ELIGIBLE APPLICANTS

For-profit and nonprofit organizations, public agencies, consortiums, and/or a collaboration of these organizations are all encouraged to apply. Consortiums, joint ventures, or collaboration of organizations with complementary skills and experience are encouraged to apply, but proposals need to clearly identify one legal entity as the prime respondent that will hold contracting responsibilities and liabilities.

### F. ADDENDA TO THIS RFP

The Workforce Partnership may revise any part of this RFP and will release an addendum that will be posted on the Workforce Partnership’s website, [workforce.org/funding](http://workforce.org/funding). Respondents are responsible for checking the website to remain informed about the process and any changes that

may affect the RFP. If respondents have difficulty or problems accessing the website or downloading information, contact the Workforce Partnership at [procurement@workforce.org](mailto:procurement@workforce.org).

## G. RIGHT TO CANCEL

The Workforce Partnership reserves the right to delay, amend, reissue or cancel, all or any part of this RFP at any time without prior notice. The Workforce Partnership also reserves the right to modify the RFP process and timeline as necessary. This RFP does not commit the Workforce Partnership to accept any proposal or execute an agreement with any bidders, nor is the Workforce Partnership responsible for any costs incurred by the respondents in the preparation of responses to this RFP. The Workforce Partnership reserves the right to reject any or all proposals, to accept or reject any or all items in the proposal and to award the contracts in whole or in part as is deemed to be in the best interest of the Workforce Partnership. The Workforce Partnership reserves the right to negotiate with any respondent after proposals are reviewed, if such action is deemed to be in the best interest of the Workforce Partnership.

## H. SUBMITTAL OF PROPOSAL

The Workforce Partnership must receive proposals no later than October 18, 2019 at **5:00 p.m.** Pacific time.

PDF versions of written and signed proposals should be sent to [procurement@workforce.org](mailto:procurement@workforce.org) with the title of "Management of Subsidized Wages – [name of bidder] response". **Late proposals will not be accepted.**

## I. QUESTIONS AND ANSWERS ABOUT THE RFP

All questions about this RFP must be submitted in writing to [procurement@workforce.org](mailto:procurement@workforce.org) with the name of the RFP in the subject line. The final day to submit questions will be on October 15, 2019 at 5:00 p.m. Pacific time. Questions received after that time will not be answered.

All questions and answers will be posted online at [workforce.org/funding](http://workforce.org/funding). The Workforce Partnership will respond to questions on a rolling basis.

## J. RESPONDENTS ORIENTATION

A virtual webinar session will be held on October 11, 2019 from 3:00 p.m. Pacific time to 4:00 p.m. Pacific time. This is an opportunity for potential respondents to request additional clarity on both the current state as well as future state needs. No inquiries will be answered outside of the respondents' orientation or Q+A process outlined in section I.

Link to Orientation: <https://global.gotomeeting.com/join/799989517>

## II. PROPOSAL SUBMISSION

Section	Section Title	Page Limit(s)
A	Cover Page	1 page
B. 1	Organizational Qualifications and Project Management	1 page
B. 2	Fiscal Qualifications	1 page
B. 3	Pricing Sheet	N/A

### A. COVER PAGE

Include company name, address, phone number, website and federal tax identification number, as well as the name, phone number, email, and electronic signature for the person authorized to negotiate the contract and make decisions for the organization.

### B. PROPOSAL NARRATIVE

Respondents must address the following sections in the proposal narrative:

#### 1. Organizational Qualifications and Project Management

Please address the following:

- Please provide an overview of your organization's experience and qualifications for similar sized projects; includes demonstrating that your organization has sufficient size and depth of management, financial strength, resources and services to support the need
- Please provide a timeline with key milestones for set-up/implementation of services and roles of responsibilities of contractor and the Workforce Partnership to achieve each milestone
- Please provide specific risks you see related to this project and how your organization will manage/mitigate these risks through your project management approach.

Responses to this section will be used to determine the organization's administrative and operational preparedness to deliver the requested services.

#### 2. Fiscal Qualifications

The Workforce Partnership currently processes an average of approximately \$11,000 per week in subsidized wage payroll, with a degree of variation between weeks based on program timelines and demand.

In this section, demonstrate your organization's capacity to manage the fiscal obligations of this project. Include a description of your organization's historical financial stability, typical operating cash flow and access to the funds necessary to run payroll of this size.

You may submit up to 5 optional financial statements or tables (e.g. cash flow statement, days-cash-on-hand analysis, calculation of current ratio/quick ratio, etc.) to supplement this narrative. Submitted statements/tables will not count against your maximum page count. It is incumbent

upon the respondent to ensure the measures which best represent their fiscal qualifications for the project are presented in this section.

Many of the Workforce Partnership's funders for direct service programs do not allow cash advances to subcontractors or prepayment for services, therefore bidders *should not* assume the Workforce Partnership will be able to provide advances or prepayments.

Responses to this section will be used to determine the organization's fiscal readiness to reliably deliver the requested services, with a particular focus on ensuring there are no barriers to the organization paying job seekers in a timely manner.

### C. PRICING SHEET

Respondents will be asked to submit a bid containing estimates related to reimbursement for the cost of wages and associated expenses (e.g. employer's portion of social security and Medicare, unemployment insurance, and so on) in addition to predetermined fees for payroll services (e.g. cost per payroll run and/or regular administrative/management fees). Prices should be valid for a period of four years.

Complete **ATTACHMENT – PRICING SHEET**. Take careful note of the instructions on the first ("Instructions") sheet of the template.

Responses to this section will be used to determine the cost efficiency of the proposal.

### D. IN-PERSON INTERVIEW

At the discretion of the Workforce Partnership, highly-ranked respondents may be asked to participate in oral interviews. Respondents will be allowed 30 minutes for oral interviews to walk through their proposed solution. The panel will ask a series of questions to allow respondents to clarify or highlight aspects of their proposal. The respondent's authorized negotiator or delegate and at least one key technical resource must be in attendance for the oral interview. The respondent is limited to a presentation team of five individuals. Finalists will be notified of interview time slot via email.

## III. EVALUATION CRITERIA AND CONTRACT AWARD

### A. EVALUATION CRITERIA AND ACCESS TO EVALUATION INFORMATION

An RFP Scoring Panel will score and rank proposals and make a recommendation for funding. The selection will be based upon proposal information supplied by the respondent in response to this RFP.

The following details the points assigned per section:



<b>Proposal Section</b>	<b>Point Value</b>
Organizational Qualifications and Project Management	15
Fiscal Qualifications	35
Pricing Sheet	50
<b>Total Points</b>	<b>100</b>

## B. CONTRACT AWARD

The RFP Scoring Panel's expects to finalize recommendations and notify all bidders of the results by October 18, 2019. Any delays to this will be communicated via email to bidders.

### 1. Negotiation/Contract

The respondent's designated authorized negotiator must be empowered to make binding commitments for the successful respondent and its subcontractors, if any. The Workforce Partnership reserves the right to negotiate the final terms of the contract agreements with the successful respondent(s). Items that may be negotiated include, but are not limited to, the scope of work, the implementation schedule, and the final award amount. If any respondent recommended for funding fails to provide services outlined in the agreement and proposal, the Workforce Partnership may use an alternate respondent to perform services upon board approval.

### 2. Cooling off period

The Workforce Partnership, the WDB and the Policy Board shall not approve or contract with, and will reject any bid or proposal submitted by an individual or entity who within the preceding twelve (12) months was themselves or employs anyone who is a current, dismissed, separated, or formerly employed person of the Workforce Partnership, and:

- a) Was employed in any position(s) of substantial responsibility in the area of service to be performed by the contract; or
- b) Participated in any way in the negotiations, transactions, planning, arrangements, or any part of the decision-making process relevant to the proposed contract/service agreement, or was or is employed in a role of substantial responsibility in the same general subject area as the proposed contract; or
- c) Is an owner, officer, principal, partner, or major shareholder of the proposed subrecipient.

This prohibition will apply to any qualified person(s) leaving the employ of the Workforce Partnership and will apply at all times during the twelve-month period beginning on the date the person left the employment of the Workforce Partnership and will apply to any procurement issued or contract executed within that twelve-month period. Potential respondents must detail any Cooling Off Period disclosures on the **ATTACHMENT - CONFLICT OF INTEREST DISCLOSURE FORM**. The Policy Board may, upon a showing of special circumstances that would justify the approval of such a contract, waive this cooling off provision.

## C. GENERAL PROVISIONS

### 1. Contract Terms, Insurance and Litigation Warranty

The RFP, any addenda, and the respondent's response shall also become part of the contract agreement between the Workforce Partnership and the respondent. The respondent shall indicate in its proposal any exceptions that the respondent takes to the terms and conditions in the **ATTACHMENT – SERVICE AGREEMENT TEMPLATE** or to any of the contents of this RFP. Contract terms required by the respondent must be included or attached to the respondent's proposal.

Respondents, by submitting a proposal, warrant that they are not currently involved in litigation or arbitration concerning their performance as it relates to the same or similar services to be supplied pursuant to the referenced contract and that no judgments or awards have been made against the respondents on the basis of their performance in supplying the same or similar services, unless such fact is disclosed to the Workforce Partnership in the proposal(s).

Disclosure of litigation will not automatically disqualify the respondents; however, the Workforce Partnership reserves the right to evaluate proposals based on facts surrounding such litigation or arbitration.

## D. APPEAL PROCESS

Only respondents to this RFP may appeal the results if the procurement process was violated in some manner, and/or Federal, State, and/or the Workforce Partnership procurement guidelines have been violated. An appeal will not be allowed to contest individual scores, the rating system, disqualification, or dissatisfaction with the evaluation results.

The appeal process is:

- A written letter of appeal will be sent to [procurement@workforce.org](mailto:procurement@workforce.org) including:
- evidence for appeal and the specific relief sought.
- The written appeal must be received by the Workforce Partnership within five business days from the date the RFP recommendation is posted on the Workforce Partnership's website.
- An appeal review panel appointed by the WDB Chair will review the appeal.
- The panel will review the appeal and collect information. At their discretion, the panel may request a meeting with the respondent and Workforce Partnership staff, and/or use other methods to gather relevant information.
- Once all the information is gathered and reviewed, the panel will issue a written decision to the appellant and the WDB.
- The decision of the appeal review panel will be final.

## E. RESTRICTION ON DISCLOSURE

Confidential information: Any information deemed confidential or proprietary by respondent must be clearly marked and identified by respondent as such and include an explanation of why such information is exempt from disclosure under applicable law.

Such identified confidential or proprietary information will be protected and treated with confidentiality to the extent permitted by law. Information not protected from disclosure by law will be considered a public record.

If respondent does not mark information as confidential or proprietary, the Workforce Partnership will treat the information as public. All sections of the proposal including attachments are subject to release.

Proposals will be received, maintained and disclosed to the public consistent with the California Public Records Act and the Freedom of Information Act. Proposals will be exempt from disclosure until the evaluation and selection process has been completed. Respondents should be aware that the Workforce Partnership is required by law to make its records available for public inspection and copying, with certain exceptions (see California Public Records Act, California Government code §§6250 et.seq. and the Freedom of Information Act, 5 U.S.C. §552).

The Workforce Partnership will not notify respondent of requests for release of information or that the Workforce Partnership released data unless the Workforce Partnership receives a request for information previously marked and identified by respondent as confidential or proprietary. If the Workforce Partnership receives a request for release of such previously marked and identified confidential or proprietary information, the Workforce Partnership will notify respondent of such request to allow respondent to challenge such request consistent with applicable law.

Respondent, by submission of materials marked confidential or proprietary, expressly acknowledges and agrees that neither the Workforce Partnership nor the City or County of San Diego will have any obligation or liability to the respondent in the event a court of competent jurisdiction compels the disclosure of these materials.

Any data to be returned should be so marked by respondent and will be returned if not essential to the proposal or contract record.

#### **IV. OTHER**

##### **A. SERVICE AGREEMENT TEMPLATE**

By submitting a proposal, you are agreeing to the terms outlined in the **ATTACHMENT – SERVICE AGREEMENT TEMPLATE**.

##### **B. CONFLICT OF INTEREST**

Bidders are required to list any and all individuals who contributed to the preparation of the proposal in the **ATTACHMENT - CONFLICT OF INTEREST DISCLOSURE FORM**. Disclosure of any actual or potential conflicts of interest relative to this Competitive Proposal is required. All bidders must fill this out and submit if even if there are no actual or potential conflicts of interest.

#### **V. REFERENCED ATTACHMENTS**

Pricing Sheet (Excel file)  
Sample Excel Timesheet Report (Excel file)  
Sample CSV Timesheet Report (CSV file)

Conflict of Interest Disclosure Form (PDF file)  
Service Agreement Template (PDF file)