



Amended as of November 22, 2021 (See Section II.B.2)
Request for Proposal (RFP)
for Career Center Operator

RFP Issued	October 18, 2021
Respondents' Orientation	October 26, 2021, 10 a.m.–12 p.m.
Notice of Intent Due	November 24, 2021, by 5 p.m.
Final Day to Submit Questions	November 24, 2021, by 5 p.m.
Proposals Due	December 10, 2021, by 5 p.m.
Respondent Interviews	January 21-26, 2022
Evaluation Completion	January 28, 2022
Anticipated Award Notification	February 25, 2022
Contract Start	April 1, 2022

Proposal must be received no later than
5 p.m. (PST)
December 10, 2021
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.

CAREER CENTER OPERATOR

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I. INTRODUCTION AND SCOPE OF WORK

A. OUR PHILOSOPHY INTRODUCTION

The San Diego Workforce Partnership (Workforce Partnership) believes in empowering job seekers to meet the current and future workforce needs of employers in San Diego. All of our work and partnerships are grounded in the framework of helping an individual find the intersection between what they love to do, what they can be paid for, what employers need, and the education, training and support they need along their career pathway.

The aspiration for our funding for the Career Center Operator (also known as One Stop Operator) is centered on helping career center (also known as America's Job Centers of California, AJCC) partners collaborate and engage in meaningful ways that support each partner's goals, ensuring integration and success of the larger system to provide services seamlessly. Review [ATTACHMENT – TECHNOLOGY AND SYSTEM REQUIREMENTS](#) to learn more about the different platforms used by the Workforce Partnership. We hope to see Respondents provide proposals that unite partners in high-level collaboration while still meeting the structure management responsibilities described in the scope of work in a manner consistent with the Workforce Partnership's values of:

- **Collaboration:** Engaging in inclusive, respectful relationships among colleagues, customers and community that foster the achievement of shared goals.
- **Excellence:** Driving quality, innovation and measurable outcomes through a customer-centered focus and a high-performance culture.
- **Stewardship:** Strategic, efficient, effective use of resources to meet the evolving needs of our customers and community with the highest levels of integrity.
- **Inclusion:** Taking responsibility for creating a culture where everyone is welcomed, heard, valued, and empowered to fully participate and reach their full potential.
- **Equity:** Prioritizing those who have been systemically denied opportunity through policies, priorities, practices, and behaviors that result in access to opportunity for ALL colleagues, customers, and communities.

B. PURPOSE OF RFP/BACKGROUND

The Workforce Partnership is soliciting proposals to identify one Subrecipient to perform the duties and responsibilities of the Career Center Operator within the career center system located around San Diego County. This Request for Proposal (RFP) was designed in partnership with career center partners to identify a Subrecipient who would be providing structure management and facilitating collaborative process improvement in an integrated environment where education, career skills training, community resources, employment assistance and wrap-around support are available in a career center model.

This RFP was prepared based upon the Workforce Innovation and Opportunity Act (WIOA) and associated U.S. Department of Labor (DOL) and California Employment Development Department (EDD) regulations and guidance. Throughout the RFP there are specific terms and language used that Respondents may not be familiar with. Please refer to [ATTACHMENT - GLOSSARY OF TERMS](#) to find definitions of commonly used phrases.

WIOA was implemented to consolidate, coordinate, and improve employment, training, literacy, and vocational rehabilitation programs in the U.S., and provides the framework for a national workforce preparation system that is flexible, responsive, customer-focused, and locally managed. Mandatory partners include WIOA Title I Adult, Dislocated Worker, and Youth programs; WIOA Title II Adult Education and Family Literacy; WIOA Title III Wagner-Peyser services; WIOA Title IV Vocational Rehabilitation; and others specified in the Act. Respondents are strongly encouraged to read this Training and Employment Guidance Letter ([TEGL 04-15](#)) issued by the DOL that outlines the vision for the one-stop delivery system under WIOA.

The three hallmarks of WIOA include:

- The needs of businesses and workers drive workforce solutions, and local boards are accountable for this within the communities they serve.
- Career centers provide excellent customer service and focus on continuous improvement.
- The workforce system supports strong regional economies and plays an active role in community and workforce development.

The WIOA system is built around the following key principles:

- Increase access and opportunity, particularly for those individuals with barriers to employment, to ensure success in the labor market.
- Support the alignment of workforce investment, education, and economic development systems in support of a comprehensive, accessible, and high-quality workforce development system.
- Improve the quality and labor market relevance of workforce investment, education, and economic development efforts to provide workers with the skills and credentials necessary to secure and advance in employment with family-sustaining wages; and to provide employers with the skilled workers they need to succeed in a global economy.
- Promote improvement in the structure and delivery of services to better address the employment and skill needs of workers, job seekers, and employers.
- Increase the prosperity of workers and employers and the economic growth of communities, regions, and states, and the global competitiveness of the United States.
- For purposes of Title I, to provide workforce investment activities through statewide and local workforce development systems that increase the employment, retention, and earnings of participants and increase attainment of recognized postsecondary credentials by participants; and as a result, improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet the skill requirements of employers, and enhance productivity and competitiveness.

C. VISION OF CAREER CENTER SYSTEM

The Workforce Partnership operates six career centers across San Diego County, providing services to job seekers and employers. The career centers are our most publicly accessible entry point and have traditionally been operated by our WIOA Career Services Subrecipient primarily providing WIOA services. At the same time, the program offerings of the Workforce Partnership have significantly diversified over the last decade, moving from solely WIOA-focused services, to include direct services that are sector-specific and other offerings to support our residents. To that end, the goals for our system are:

- Align our increasingly diverse funding and programming with our most well-known, commonly used service, located in our physical career center locations.

- Create one central entry point for all services
- Increase control of customer experience to provide consistent and less duplication of services
- Implement performance-based contracting to drive toward true impact
- Identify balance between virtual and in-person services
- Move from one-size fits all to customized levels of service
- Allow our system to be more accessible for local organizations

Looking at the best practices to support our goals, we have four separate core functions:

1. Career Center Operator will focus on two key areas – structure management and partner relationships, engagement, and innovation. See below Section D for scope of work.

2. Customer Experience - the Workforce Partnership will manage customer experience and work with partners to provide service navigation.

3. Basic Career Services – the Workforce Partnership will be responsible for providing basic career services, which represent “front end” basic services to job seekers. Basic career services are self-service and/or informational and do not require enrollment for WIOA.

4. Individualized Career Services – the Workforce Partnership seeks to procure one Subrecipient to provide career services. The funded Subrecipient will be responsible for supporting job seekers with the training, education, supportive services, and job search assistance they need to meet their employment goals. **Refer to the RFP – Career Center Services that was released on October 18, 2021, for more details.**

Location of our career centers - The Workforce Partnership operates six career centers across San Diego County, providing services to job seekers and employers.

1. Comprehensive Career Centers

- Metro Career Center
4389 Imperial Avenue
San Diego, CA 92113
- South County Career Center
1111 Bay Boulevard
Chula Vista, CA 91911

2. Affiliate Career Centers

- East County Career Center
151 Van Houten Avenue
El Cajon, CA 92020
- North Coastal Career Center (Located in the Live Well Center)
3708 Ocean Ranch Blvd.
Oceanside, CA 92056
- North Inland Career Center (Located in the Live Well Center)
649 W. Mission Avenue

Escondido, CA 92025

- Bank of America Merrill Lynch Workforce Development Center (Located in the Downtown Library)
330 Park Blvd, Room #555
San Diego, CA 92101

D. SCOPE OF WORK

The Workforce Partnership seeks to procure a Career Center Operator to provide services that act as a conduit for excellence within the career centers to offer effective and efficient structure and systems to allow partners to succeed and participants to thrive. The Career Center Operator will act as a liaison between the Workforce Partnership and career center collocated partners with responsibilities listed in the scope of work below. There are two main elements in the scope of work:

- Partner Relationships, Engagement, and Innovation, focusing on establishing strong relationships with and between collocated partners at the career centers and fostering an environment where partners have knowledge of each other's program offerings and goals so that they can seamlessly refer clients to their respective programs and provide mutual support toward each of their goals.
- Career Center Structure Management, focusing on the physical maintenance and upkeep of the career centers and operational systems.

The following are the individual items of the scope of work:

1. Partner Relationships, Engagement, and Innovation

- Coordinate the implementation of and enforce Workforce Partnership negotiated Memoranda of Understanding (MOU's) and all other agreements with all mandated partners
 - Identify and recommend changes to the Workforce Partnership that may be needed to partner working agreements
- Manage, advise, and assist with the development and completion of all relevant career center credentialing
 - Ensure career centers meet and maintain all WIOA certification requirements, including but not limited to baseline and Indicators of Excellence as established by California Workforce Development Board (CWDB) as well as managing and supporting the associated Continuous Improvement Plan
 - Conduct a self-evaluation of the comprehensive career centers and provide recommendations to the Workforce Partnership for continuous improvement strategies drawing on the career center criteria/quality Indicators established by the Workforce Partnership
- Enforce all policies, laws, directives, and regulations including but not limited to Occupational Safety and Health Administration (OSHA), American with Disabilities Act (ADA), Centers for Disease Control and Prevention (CDC), etc. and provide training for all career center partner staff
 - Maintain required documentation of meetings and events per the Workforce Partnership Identify needs for career center partner coordinated activities and

- implement or, if needed, propose them to the Workforce Partnership to support issues of shared space, program support and client experience.
- Liaise between the Workforce Partnership and career center partners to resolve partners' grievances, concerns and all issues related to working in the career centers.
- Build strong partner relationships both with and between partners to facilitate customer and partner success
 - Collaboratively identify gaps, build, implement, and monitor shared vision with partners for processes and physical environment to provide family-friendly service delivery and cutting-edge employment readiness environment
 - Facilitate partner support of each other's goals and successes including regular sharing of programming
 - Create and maintain continuous improvement processes with partners
 - Provide reporting as required including performance indicators for Comprehensive career center partners' systems to improve coordinated service delivery and client outcomes

2. Career Center Structure Management

- Be responsive to and implement all process and infrastructure changes as directed by the Workforce Partnership for improved engagement and service delivery including but not limited to connectivity, accessibility, and customer experience
 - Engage partners and develop recommendations for 2-Gen family-friendly career centers
- Engage with IT management and provide long-term needs assessments
 - Provide Helpdesk ticket oversight/management of items for the network providers and hardware/software support such as:
 - Monitor repetitive helpdesk issues that need training/upgrades
 - Track Computer\Network\Phones issues to provide awareness and/or recommendations to the Workforce partnership
- Manage Facilities
 - Collect agreed upon cost shares from collocated partners as documented in the MOUs
 - Schedule and follow up on repairs including but not limited to HVAC, plumbing, resources, etc.
 - Maintain facilities such as aesthetics, cleanliness, resources, and emergent needs
 - Maintain full/near full level of occupancy
 - Maintain buildings
 - Investigate, develop, and manage security contracts
 - Identify opportunities for more cost-effective site locations, including forging partnerships with public/private entities
 - Identify physical changes that enhance the customer experience, particularly parenting job seekers

E. CONTRACT PERIOD

The Workforce Partnership intends to award one contract with a base year (15 months) that will begin on April 1, 2022, and end on June 30, 2023, with the option to extend the agreement for three (3) additional 12-month periods based on organizational need, service provider performance, and funding availability.

The Workforce Partnership anticipates awarding approximately \$375,000 in WIOA funding through this RFP for the base year, with the opportunity for subsequent one-year extensions at \$300,000 per year. This amount is an estimate based on past WIOA allocations and is subject to change as the Workforce Partnership receives funding allocations from the DOL and the EDD in the spring of 2022. Contracts will be structured as cost reimbursement.

Figure 1 shows the estimated funding availability and the funding categories for the contract that will be awarded for this RFP.

Figure 1: Estimated Funding Availability	
Category	Total Funding
Operator Cost FY23 (12 months)	\$300,000
4th Quarter FY22	\$75,000
Total Contractor FY23/Q4 FY22	\$375,000

F. 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 Board of Directors which is comprised of the Workforce Development Board (WDB) and the Policy Board. For additional information on the Workforce Partnership, visit workforce.org.

G. 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. Entity must not be excluded or disqualified through the System for Award Management (SAM).

H. 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. 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.

I. 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 Respondent, 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.

J. SUBMITTAL OF NOTICE OF INTENT AND PROPOSAL

1. Notice of Intent

Notice of Intent (NOI) must be submitted and include your organization's Dun & Bradstreet Data Universal Numbering System (DUNS) number on the NOI. To request a DUNS number, visit the [DUNS Number](#) website. The NOI needs to be completed and submitted by **November 24, 2021, 5:00 p.m. (PST)**.

To submit the NOI, access the Workforce eBid site on the Workforce Partnership website, Career Center Operator RFP. To gain access, the Respondent will be required to create a unique password and provide the main point of contact's email address. The Respondent will have the opportunity to submit for bid by entering the organization's information and selecting the proposal they are submitting. The Respondent will digitally sign the form as confirmation to bid. An email confirmation with a snapshot of the submission form along with the digital signature will be provided as proof of submission. If the Respondent wishes to submit another proposal after initial submission, they can do so by selecting the desired proposal and submitting another NOI. The Respondent will receive another email confirmation listing the intended proposal. If you have any questions or need assistance, you can e-mail procurement@workforce.org.

2. Proposal

The Workforce Partnership must receive proposals no later than **December 10, 2021, by 5 p.m. (PST)**. **Late proposals will not be accepted.**

To submit a proposal, log on to the Workforce eBid site using the email address along with the unique password that was created when the NOI was submitted. The proposal can be digitally signed as confirmation of submission of proposal once it has been uploaded onto the Workforce Partnership eBid site. An email confirmation with a snapshot of the submission of proposal form along with the digital signature will be provided as proof of submission.

K. QUESTIONS AND ANSWERS ABOUT THE RFP

All questions about this RFP must be submitted in writing to procurement@workforce.org with the name of the RFP in the subject line. The final day to submit questions will be on November 24, 2021, by 5 p.m. (PST). Questions received after that time will not be answered.

All questions and answers will be posted online at workforce.org/funding. The Workforce Partnership will respond to questions on a rolling basis.

L. RESPONDENT'S ORIENTATION

A virtual webinar session will be held on October 26, 2021, 10 a.m.–12 p.m. (PST). 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 Question and Answer process outlined in *Section K – Questions and Answers About the RFP* above.

The link to the virtual orientation will be available on our website under the funding section - [Funding - San Diego Workforce Partnership](#).

II. PROPOSAL SUBMISSION

A. PROPOSAL CHECKLIST

The following details are the page limits per section and reference **ATTACHMENT – PROPOSAL CHECKLIST**:

Section	Section Title	Page Limit(s)
I.J.1.	Notice of Intent	Complete Form on Website (Workforce eBid)
II.A.2.	Additional Attachments	10 Pages
II.B.1.a.	Cover Page	1 Page
II.B.1.b.	Table of Contents	1 Page
II.B.1.c.	Organizational Qualifications	5 Pages
II.B.1.c.	Organizational Chart	1 Page per organization included
II.B.2	Past Performance	2 Completed Questionnaires
II.B.3	Narrative	20 Pages
II.B.4	Project Budget	Budget Packet (Budget must be submitted in Excel)
III.D.	Conflict of Interest Disclosure Form	Complete Form on Website (Workforce eBid)

1. Formatting Requirements

Respondents must adhere to the formatting requirements. A deduction of points will be made in this category if the following have not been met:

- Font size: 11 point
- Font: Arial
- Margins: At least one inch
- Line spacing: Double-spaced
- Language: English
- All pages numbered
- All attachments labeled

2. Additional Attachments

Letters of support/commitment, MOUs that detail partnership roles and responsibilities and any in-kind resources committed are encouraged and can be included in the 10 pages of "additional attachments". Respondents can also include charts (charts that are included as part of the RFP do not count toward the page limit), maps, visuals, and diagrams to support their proposal.

B. EVALUATION CRITERIA AND ACCESS TO EVALUATION INFORMATION

An RFP Evaluation 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 his RFP. Respondents must have a total average score of 240 points or higher to be recommended for funding.

The following details are the points assigned per section:

Proposal Section	Point Value
1. Organizational Qualifications (Includes Cover Page and Table of Contents)	20
2. Past Performance	75
3. Service Design Narrative	120
4. Project Budget	40
5. Zoom Interview	45
Total Points	300

1. Organizational Qualifications (20 POINTS)

a. Cover Page:

- Include company name, address, phone number, website, and federal tax identification number.
- Include proposal name; and
- Include the name of the person authorized to negotiate the contract and make decisions for the organization including the phone number, and e-mail address.

b. Table of Contents

- Include a clear identification of the materials in the proposal by section and page number.

c. Qualifications

- Respondents must address the following sections in the proposal narrative:
- Describe the Respondent's qualifications to provide the Career Center Operator services.
- Provide a comprehensive description of the Respondent's fiscal and administrative record keeping methods to facilitate audit reviews, documentation, and historical files
- Describe if the proposal is a joint proposal and, if so, who the principal collaborator is and what each organization's overall responsibilities will be in the delivery of services
- Provide an overview of the Respondent's organization and its experience and qualifications for similar sized projects; include demonstrating that the organization has sufficient size and depth of management, financial strength, resources, and systems to support the scope of work
- Submit an organizational chart (1 page) and resumes (no page limit) for staff working on this project.

2. Past Performance (75 POINTS)

Two (2) completed **ATTACHMENT – CAREER CENTER OPERATOR RFP PAST PERFORMANCE QUESTIONNAIRE** must be submitted from organizations from whom the Respondent has been directly funded to deliver projects similar in scope.

Questionnaires must be for projects the Respondent has managed within the past five years. If a joint proposal is submitted, Questionnaires must be completed for the lead entity (i.e., the organization that assumes financial responsibility).

Respondents who have had contracts with the Workforce Partnership within the past two years must include the Workforce Partnership as one of the agencies completing a Questionnaire and the other completed by another organization. **If a Respondent has been funded for WIOA services through another workforce board or funder within the past two years you must include that funder as one of the agencies who completes the Questionnaire.** Each of the Respondent's Questionnaires must be completed and emailed directly to procurement@workforce.org by the referring agency by the proposal due date. Past Performance Questionnaires received after the proposal due date will not be accepted.

Respondents will be deducted points in this category if the Workforce Partnership does not receive two past performance questionnaires via email from the referring agency by the proposal deadline.

The Evaluation Panel will evaluate the following:

1. Does the Respondent have two questionnaires?
2. Was the past performance questionnaire based on a project within the past five years?
3. On the past performance questionnaire, did the Respondent demonstrate positive outcomes in projects similar in scope to this RFP.

3. Service Design Narrative (Total 120 Points)

For each scope of work item listed below, please provide:

- A thorough description of the Respondent's vision and implementation plan including experience and qualifications that pertain to that scope of work item
- A description of any partnerships and the partner(s)' role(s) in the delivery of those services, the partner's experience and qualifications that show why they are needed for the contract

Scope of Work Items

Partner Relationship, Engagement, and Innovation

- Coordinate the implementation of and enforce the Workforce Partnership negotiated MOU's and all other agreements with all mandated partners
 - Identify and recommend changes to the Workforce Partnership that may be needed to partner working agreements
- Manage, advise, and assist with the development and completion of all relevant career center credentialing
 - Ensure all career centers meet and maintain all WIOA certification requirements including but not limited to baseline and Indicators of Excellence as established by CWDB managing and supporting the continuous improvement plan
 - Conduct a self-evaluation of the comprehensive career centers and provide recommendations to the Workforce Partnership for continuous improvement strategies drawing on the career center criteria/quality indicators established by the Workforce Partnership
- Enforce all policies, laws, directives, and regulations including but not limited to OSHA, ADA, CDC, etc. are followed, and provide training for all career center partner staff

- Maintain required documentation of meetings and events per the Workforce Partnership
- Identify needs for career center partner coordinated activities and implement or, if needed, propose them to the Workforce Partnership to support issues of shared space, program support and client experience
- Liaise between the Workforce Partnership and career center partners to resolve partners' grievances, concerns, and all issues
- Build strong partner relationships both with and between partners to facilitate customer and partner success
 - Collaboratively identify gaps, build, implement, and monitor shared vision with partners for processes and physical environment to provide family-friendly service delivery and cutting-edge employment readiness environment
 - Facilitate partner support of each other's goals and success including regular sharing of programming
 - Create and maintain continuous improvement processes with partners
 - Provide reporting as required including performance indicators for Comprehensive career center partners' systems to improve coordinated service delivery and client outcomes

Career Center Structure Management

- Be responsive to and implement all process and infrastructure changes as directed by the Workforce Partnership for improved engagement and service delivery including but not limited to connectivity, accessibility, and customer experience
 - Engage partners and develop recommendations for 2-Gen family-friendly career centers
- Engage with IT management and provide long-term needs assessments
 - Provide Helpdesk ticket oversight/management of items for the network providers and hardware/software support such as:
 - Monitor repetitive helpdesk issues that need training/upgrades
 - Track Computer\Network\Phones issues to provide awareness and/or recommendations to the Workforce Partnership
- Manage Facilities
 - Collect agreed upon cost shares from collocated partners as documented in the MOUs
 - Schedule and follow up on repairs including but not limited to HVAC, plumbing, resources, etc.
 - Maintain facilities such as aesthetics, cleanliness, resources, and emergent needs
 - Maintain full/near full level of occupancy
 - Maintain buildings
 - Investigate, develop, and manage security contracts
 - Identify opportunities for more cost-effective site locations, including forging partnerships with public/private entities
 - Identify physical changes that enhance the customer experience, particularly parenting job seekers

4. Budget Justification (Total 40 Points)

The Respondent must submit **ATTACHMENT – BUDGET**, **ATTACHMENT – BUDGET NARRATIVE**, and **A COST ALLOCATION PLAN AND AN INDIRECT COST RATE AGREEMENT**. Although the Budgets (and subsequently Invoices) will be reported county wide, the awarded Subrecipient must track expenditures by career center and be able to provide that information upon request.

The Budget file categories include but are not limited to; personnel, non-personnel, sub-contracts, indirect, and profit that covers the entire contract period for the first year of the contract. Personnel costs must identify the staff position, annual salary, and percentage of annual time spent on the funding sources for every staff position by program year. Positions related to fundraising are not allowable under WIOA. Non-personnel costs should also be further outlined into specific line items (e.g., supplies, equipment, repairs, and mileage). A budget (Excel file) must be included in submission. Pricing must be inclusive of cost of supply and provision of services during the service period and include any applicable taxes. The prices quoted should be valid for a period of 4 years (cost of living and additional costs will be negotiated each contract year).

The Budget Narrative file items shall correspond to each line-item in the Project Budget Detail tab of the Budget file. This narrative should justify the need for all costs built into the line-item and the methodology used to derive each cost.

For guidance on completing the Budget and the Budget Narrative, please see **ATTACHMENT – BUDGET AND BUDGET NARRATIVE INSTRUCTIONS**. The template files are provided for a Windows Environment computer (MAC systems must not be used). You should be using a recent version of MS Excel and MS Word that are configured with MS "recommended" security settings, without custom options. Please do not modify the template files in any way (except adding rows in the budget narrative file).

a) Cost Allocation Plan

The cost allocation plan describes the methodology that will be used to prorate common operating costs to each funding source. Examples of common operating costs are infrastructure costs (e.g., copier machines), as well as personnel (e.g., receptionist, fiscal staff, senior management) providing benefits to multiple funding sources. Furthermore, the estimated amounts derived from the proposed methodology should be allocated to each budget line item. All costs should be identified as program or program support costs (see Section 4 - Program Support vs. Program Costs).

b) Indirect Costs and Negotiated Profit

Any indirect costs budgeted must be supported by a Negotiated Indirect Cost Rate Agreement (NICRA) with a federal or state cognizant agency. If a Respondent does not have an approved indirect rate but wishes to include indirect costs in its proposal, it must submit all relevant financial information that outlines how the indirect rate and costs were determined and future steps for required approval by the relevant cognizant agency. For-profit organizations' negotiated profit line item shall not be negotiated at a rate higher than 10% of the total project. Indirect Costs and Negotiated Profit shall not exceed a maximum of 15%. The following factors are considered in negotiating profit:

- The Respondent's effort measured by the complexity of the work to be performed and amount of subcontracting (if approved under the contract terms);

- Contract cost risk.
- The Respondent's investment and independent development.
- The quality of the contractor's record of past performance including cost control and past accomplishments.
- Additional factors as needed.

c) Program Support vs. Program Costs

WIOA identifies two cost categories: administrative and program costs. For the purpose of the RFP, the Workforce Partnership defines administrative costs as support costs. Respondents may not exceed the cap of 5% on support costs. Support costs typically include salary and wages for staff who work in Finance, Human Resources, Payroll, Legal, Property Management, etc. as well as other associated costs related to these functions. For more information on support and program costs, refer to [2 CFR parts 200](#) and [2900](#). All Respondents should follow this rule when classifying budget costs as program support or program costs. Disallowed Cost include:

- Food and beverages
- Bad debt
- Advertising (other than help-wanted ads and procurement requests)
- Contributions/Donations to other non-profits
- Entertainment
- Fines and penalties
- Lobbying and fundraising costs
- Equipment purchases >\$100 without prior approval from Workforce Partnership

d) Subcontractors

If applicable, the Respondent must describe its plan to subcontract any portion of the services in Section 3 Service Design. The Respondent must follow their own procurement procedures to procure subcontractors if those procedures reflect state and local laws and conform to the standards in [2 CFR parts 200](#) and [2900](#). If a proposal identifies a specific subcontractor as collaborating in the design or provision of services, the Workforce Partnership's award of the grant does not provide the justification or basis to sole source the procurement of those services, thereby avoiding full and open competition for the provision of the planned services. Procurement of subcontractors may be done before or after submitting a proposal. See **ATTACHMENT – CONTRACT GENERAL PROVISIONS** for additional information. The Respondent's subcontracts funded with WIOA must be reviewed and approved by the Workforce Partnership prior to executing.

Respondents must complete the following budget documents and prepare a budget in accordance with **ATTACHMENT – BUDGET AND BUDGET NARRATIVE INSTRUCTIONS**.

- Budget
 - Personnel Detail Tab
 - Personnel Detail In-Kind Match Tab
 - Project Budget Detail Tab
 - Cost Analysis Tab
- Budget Narrative
- Cost Allocation Plan, if applicable

- Negotiated Indirect Cost Rate Agreement (NICRA), or all relevant financial information that outlines how the indirect rate and costs were determined and future steps for required approval by the relevant cognizant agency.
- The Workforce Partnership will conduct a Cost Price Analysis of the proposed budget details to determine reasonableness, allocability, and allowability of costs using the following criteria:
 - Did the Respondent include a Budget Narrative that outlines each line item in the Budget and explains the items and methodology for each line item in the Budget
 - Was a Negotiated Indirect Cost Rate Agreement (NICRA) submitted
 - Was a Cost Allocation Plan submitted
 - Are the indirect and profit costs reasonable and acceptable to meet performance objectives
 - Are the proposed costs reasonable and acceptable to meet performance objectives
 - Did the Respondent allocate a living wage for each of their staff at \$18.66 per hour

5. Zoom Interview (45 Points)

Respondents must score 204 points to advance to the zoom meeting. 204 points is 80% of 255 points, the total available not including the 45 points available for the zoom meeting. Respondents will be allowed 20 minutes to deliver a presentation and 40 minutes to answer interviewers' questions. The Evaluation 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. The interview will be held remotely, and the link provided in the email notification.

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The 1.5-hour allotments allowed for:

- Time in case of technical difficulties with the Zoom application
- Time for all attendees to join meeting (Workforce Partnership Staff, evaluators, and respondent staff)
- Time for Workforce Partnership Staff to provide outline of interview, set 20-minute presentation and interview timers
- Time for Respondent staff to share their screen for their presentation
- Time for transition between presentation and interview questions
- Any remaining time for evaluators to discuss as a group the answers provided during the interview and update their scoring sheets if necessary

C. CONTRACT AWARD

An RFP Evaluation Panel will score and rank proposals and make a recommendation for funding. The RFP Evaluation Panel's recommendations will be finalized, and all Respondents will be notified of the results by February 25, 2022.

D. 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.

This project is an investment in the Workforce Partnership's infrastructure and operations (i.e. – is not a programmatic funding contract to a Subrecipient). Per the Workforce Partnership's approved signature authority guidelines, such investments, if included in a budget previously approved by the WDB and Policy Board, do not require separate board approval.

E. 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:

- Was employed in any position(s) of substantial responsibility in the area of service to be performed by the contract; or
- 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
- Is an owner, officer, principal, partner, or major shareholder of the proposed Subrecipient.

This prohibition will apply to any qualified person(s) leaving employment 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 **CONFLICT OF INTEREST DISCLOSURE FORM**. The Board of Directors may, upon a showing of special circumstances that would justify the approval of such a contract, waive this cooling off provision.

F. TECHNOLOGY AND SYSTEM REQUIREMENTS

The Respondent must comply with the Workforce Partnership's technology and system requirements as indicated in **ATTACHMENT – TECHNOLOGY AND SYSTEM REQUIREMENTS**.

G. GENERAL PROVISIONS

1. Contract Terms 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 – CONTRACT GENERAL PROVISIONS AND ATTACHMENT – CONTRACTUAL AGREEMENT TEMPLATE** 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.

H. 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 Respondent must submit an appeal within five (5) business days from the date the RFP recommendation is posted on the Workforce Partnership website. The Workforce Partnership will render a decision within ten (10) business days of receipt of the appeal.

1. Filing an Appeal

The Appeal Resolution timeline begins on the actual day on which the written appeal is received by the Workforce Partnership.

To appeal, a written letter of appeal must be sent to complaints@workforce.org including evidence for appeal grounds and specific relief sought.

The Workforce Partnership will acknowledge receipt of the appeal within one (1) business day of the date of filing.

The EO Officer/Grievance Officer will review the appeal to determine if it meets the criteria for a valid appeal. Acceptance of the appeal will be based on the following:

- Appeal must have been received within five (5) business days from the date the RFP recommendation is posted on the Workforce Partnership's website.
- Only Respondents may appeal the results if the procurement process was violated in some manner, and/or Federal, State, and/or the Workforce Partnership RFP guidelines have been violated.
- An appeal will not be allowed to contest individual scores, the rating system, disqualification, or dissatisfaction with the evaluation results.
- A notification will be sent to the recommended awardee (the winning Respondent) and the appellant to advise of appeal investigation and date of when results and next steps will be available.

2. Review Panel

- An appeal review panel appointed by the Workforce Development Board Chair will review the appeal to render a decision.
- The panel will review the appeal and collect information. At their discretion, the panel may request a meeting with Respondent and/or the 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 EO Officer/Grievance Officer.

3. Notice of Final Action

The Workforce Partnership EO Officer/Grievance Officer will notify the appellant and the recommended awardee within ten (10) business days of receipt of the appeal. The decision of the appeal will be final.

I. 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.

III. OTHER

A. CERTIFICATE OF INSURANCE

By submitting a proposal you are agreeing to provide a commercial general liability insurance policy, naming The San Diego Workforce Partnership, the City of San Diego, and the County of San Diego as additional insured, protecting against any and all claims for injury to persons or property, protecting against assumed or contractual liability under this Agreement, and covering negligent acts and omissions of Contractor and Contractor Parties, with such policy to be in the minimum amount of One Million Dollars (\$1,000,000.00) per occurrence, and with an aggregate limit of at least Two Million Dollars (\$2,000,000.00). Contractor shall provide the Workforce Partnership a certificate evidencing such insurance. See **EXHIBIT- CERTIFICATE OF INSURANCE**.

B. GENERAL PROVISIONS

By submitting a proposal, you are agreeing to the terms outlined in the **ATTACHMENT – CONTRACT GENERAL PROVISIONS**.

C. CONTRACTUAL AGREEMENT TEMPLATE

By submitting a proposal, you agree to the terms outlined in the **ATTACHMENT – CONTRACTUAL AGREEMENT TEMPLATE**.

D. CONFLICT OF INTEREST

Respondents are required to list any and all individuals who contributed to the preparation of the proposal such as an employee, officer, agent, and relatives including spouses, registered domestic partners, children, siblings, parents, in-laws and step relatives. Disclosure of any actual or potential conflicts of interest relative to this Competitive Proposal is required and shall be included in the **CONFLICT OF INTEREST DISCLOSURE FORM**. All Respondents must fill this out and submit if even if there are no actual or potential conflicts of interest.

To complete the **CONFLICT OF INTEREST DISCLOSURE FORM**, log on to the Workforce eBid site using the email address along with the unique password that was created when the Notice of Intent was submitted. The **CONFLICT OF INTEREST DISCLOSURE FORM** can be digitally signed as confirmation once it has been completed in the Workforce eBid. An email confirmation with a snapshot of the **CONFLICT OF INTEREST DISCLOSURE FORM** along with the digital signature will be provided as proof of completion. Must complete no later than December 10, 2021, and no later than 5:00pm (PST).

E. STATEMENT OF QUALIFICATIONS (SOQ)

By submitting a proposal, you are agreeing to the terms outlined in the **ATTACHMENT – STATEMENT OF QUALIFICATIONS**. The SOQ will establish a Respondent's qualifications to bid for WIOA funds. The submission of a SOQ determines an organization's legal, administrative, and fiscal capacity to meet the Workforce Partnership, State, and Federal government requirements. The SOQ places organizations on the Qualified Agencies List (QAL), which allows the organization to be eligible to respond to RFPs and to be awarded a contract with the Workforce Partnership. If selected, the SOQ documents must be submitted at the time of award and updated annually with the Workforce Partnership. Failure to provide SOQ and/or incomplete SOQ will result in award of contract to next highest scoring respondent.

The Workforce Partnership encourages the participation of respondents who are certified as small businesses, minority-owned firms, women's business enterprises, emerging businesses, disabled veteran businesses, and disadvantaged businesses. Such certification shall be documented in the SOQ.

IV. REFERENCED ATTACHMENTS

- Attachment – Budget
- Attachment – Budget Narrative
- Attachment – Budget and Budget Narrative Instructions
- Attachment – Contract General Provisions
- Attachment – Contractual Agreement Template
- Attachment – Glossary of Terms
- Attachment – Career Center Operator RFP Past Performance Questionnaire**
- Attachment – Proposal Checklist
- Attachment – Statement of Qualifications (SOQ)
- Attachment – Technology and System Requirements
- Exhibit – Certificate of Insurance (COI) Example