



Amended as of November 22, 2021 (See Section II.B.2 and IV.)

**Request for Proposal (RFP)
For Career Services to serve Adults and Dislocated Workers**

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	June 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 SERVICES TO SERVE ADULT AND DISLOCATED WORKERS

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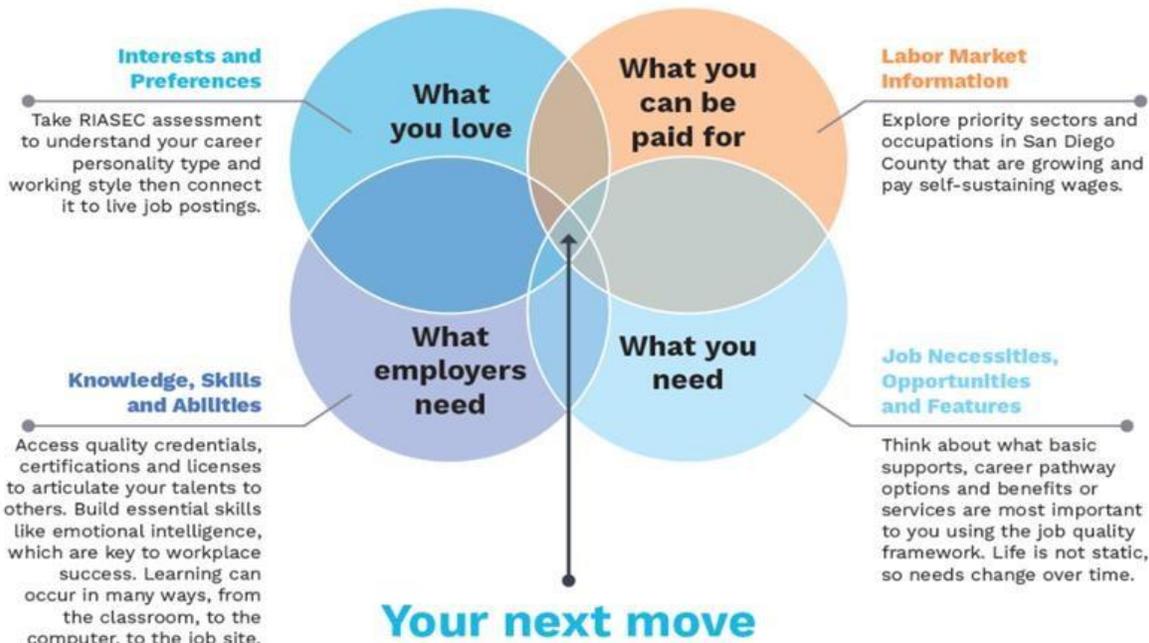
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I. INTRODUCTION AND SCOPE OF WORK

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 Adult and Dislocated Workers is centered on helping job seekers align their interests and skills with education, training, and employment. We expect Respondents to infuse these tenets into the foundation of your program design, while still meeting the required program elements and services. Review **ATTACHMENT – TECHNOLOGY AND SYSTEM REQUIREMENTS** to learn more about the different platforms used by the Workforce Partnership.



B. PURPOSE OF RFP/BACKGROUND

The Workforce Partnership is soliciting proposals to identify one Subrecipient to deliver Workforce Innovation and Opportunity Act (WIOA) Title I Adult and Dislocated Worker (DW) services at the career centers located around San Diego County [also referred as America Job Centers of California (AJCC)]. This Request for Proposals (RFP) is designed to identify a Subrecipient who would offer services in an integrated environment where education, career skills training, community resources, employment assistance and wrap-around support are available in a one-stop career center model for adults.

This RFP was prepared based upon the 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 NETWORK

The Workforce Partnership operates six [career centers](#) across San Diego County, providing services to job seekers and employers. These Career Centers are our most publicly accessible entry point and have traditionally been operated by our WIOA Career Services Subrecipient, therefore 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 direct services that are sector specific.

Goals for Our Network:

- 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.

Separate Core Functions:

1. Career Center Operator Duties - the Operator will focus on two key areas –partner relationships, engagement and innovation and structure management. **Refer to the RFP – Career Center Operator that was released on October 18, 2021, for more details.**

- *Partner Relationships, Engagement and Innovation.* Focusing on establishing strong relationships with and between colocated 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.
- *Structure Management.* Focusing on the physical maintenance and upkeep of the career centers and operational systems.

2. Customer Experience - the Workforce Partnership will be managing the customer experience in close collaboration with the funded Subrecipient.

- *Service Navigation.* The Workforce Partnership will be responsible for staffing career center front desks and initial, pre-enrollment assessment to assist customers in finding programs and services of interest to them.
- *Customer Experience Standards.* The Workforce Partnership will set and hold the funded Subrecipient accountable to standards for the Customer Experience. These include qualitative requirements for the process of customer service (for example, language that should be used in addressing customers) and target scores for customer experience metrics.
- *Training.* The Workforce Partnership will supply the funded Subrecipient with training regarding these customer experience standards. The Career Services Provider must ensure that all staff allocated to Workforce Partnership funding successfully complete this training in the timeline required by the Workforce Partnership.
- *Service Delivery.* The funded Subrecipient must ensure its staff are delivering services in accordance with the training.
- *Survey Collection.* The Workforce Partnership will collect customer experience surveys from customers. Currently, the Workforce Partnership either collects or plans to collect these by

Short Message Service (SMS) text message for all customers who call career centers, by email (in staff and subrecipient staff email signatures), in-person at career center kiosks and on the Workforce Partnership website. The funded Subrecipient may be required to assist with survey collection by doing things like updating staff email signatures.

- **Scores.** The Workforce Partnership will set target scores for customer experience surveys and provide the career services provider with survey results on a regular basis. The funded Subrecipient will be required to provide services that result in surveys meeting or exceeding these targets.

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.

Some basic services will be provided by the Workforce Partnership’s Customer Experience Department. Some of the components of basic services defined in the next section will be provided by the funded Subrecipient through this RFP.

See **ATTACHMENT – STATEMENT OF WORK** for detailed basic career services.

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. See **ATTACHMENT – STATEMENT OF WORK** for detailed individualized career services. This scope includes key areas below:

- Career Counseling
- Employment services
- Training Services
- Supportive Services
- Business Services
- Follow-Up Services

D. CONTRACT PERIOD

The Workforce Partnership intends to award one contract for Career Services (Individualized Career Services) to serve adults and dislocated workers throughout San Diego County. A base year (13 months) will begin on June 1, 2022, and end on June 30, 2023, with the option to extend the agreement for three (3) additional one (1) year periods based on organizational need, service provider performance, and funding availability.

The Workforce Partnership anticipates awarding approximately \$3.5 million in WIOA adult/dislocated worker funding through this RFP for the base year (\$500,000 of this will only be allocated the first year to provide transitional career services for an estimated 1,000 carry-in participants from existing Subrecipient). The 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.

The \$3 million contract will be structured as a Performance-based Contract (Subrecipients are afforded the flexibility to serve participants in customizable ways but are paid for specific deliverables). The contract payments are structured around performance-based monthly payments as outlined in **ATTACHMENT – PERFORMANCE METRICS**. Cost per participant should not exceed \$3,000. Respondents are encouraged to build a model that leverages outside funding for adults and dislocated workers. The additional funds of \$500,000 for transitional services will be structured as a cost reimbursement contract.

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

Figure 1: Estimated Funding Availability Per Region*				
Region	Geographic Distribution (Adult/DW)	Adult Estimated Funding	Dislocated Worker Estimated Funding	Total Funding
East	17% / 15%	\$238,000	\$240,000	\$478,000
Metro	39% / 35%	\$546,000	\$560,000	\$1,106,000
North	26% / 21%	\$364,000	\$336,000	\$700,000
South	18% / 29%	\$252,000	\$464,000	\$716,000
Transition Services	County-Wide	\$240,000	\$260,000	\$500,000
Total	100%	\$1,640,000	\$1,860,000	\$3,500,000

*Subject to change based on PY 22/23 allocations from DOL/EDD of California.

E. ORGANIZATIONAL OVERVIEW & GOVERNANCE

The Workforce Partnership is a 5011(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.

F. 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).

G. 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.

H. 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.

I. 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 Services to serve Adults and Dislocated Workers 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 5:00 pm (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 Workforce 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.

J. 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 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.

K. RESPONDENTS ORIENTATION

A virtual webinar session will be held on October 26, 2021, 10a.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 Q+A process outlined in section J – *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, EVALUATION CRITERIA AND CONTRACT

A. PROPOSAL SUBMISSION

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

Section	Section Title	Page Limit(s)
I.I.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 and Project Management	4 Pages
II.B.1. c.	Organizational Chart	1 Page per organization/partner included
II.C.1. c.	Resumes	No Page Limit
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)
II.B.5	Staff Positions	2 Pages
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, 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 this 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 and Project Management (Includes Cover Page and Table of Contents)	30
2. Past Performance	60
3. Narrative	120
4. Project Budget	30
5. Staffing	15
6. Zoom Interview	45
Total Points	300

1. COVER PAGE, TABLE OF CONTENTS, AND ORGANIZATIONAL QUALIFICATION AND PROJECT MANAGEMENT (30 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 material in the proposal by section and by page number.

c. Organizational Qualifications and Project Management:

Summarize what you want the evaluation panel to know about your organization:

- Experience in the following areas:
 - Managing employment and training programs,
 - Operating federally funded programs,
 - Providing services to disadvantaged populations,
 - Being extremely innovative in an environment with a multitude of regulations.
 - Process for standing up a new program quickly and adjusting quickly when program requirements change.
- Provide specific examples of where you have innovated and implemented changes beyond standard WIOA programs.
- Please provide specific risks you see related to this project and how your organization will manage/mitigate these risks through your project management approach.
- Describe your strategy for understanding, monitoring, and measuring program operations in connection to performance outcomes.
- Describe your process and experience in ensuring quality, compliance, and proper documentation for projects of similar size/scope of work.
- Describe how you will ensure funds are used properly and according to policy, process, and according to overall spending plan; and
- Include strengths and weaknesses.
- Other potential areas that can be addressed in this section may include but are not limited to your experience with the following:
 - Addressing complaints from participants, partners, and staff.
 - Operating inclusive workforce development programs.
 - Fostering collaboration and partnerships.
 - Information sharing across a variety of partners and programs.
 - Leveraging and blending existing agency adult serving programs; and
 - Working on diverse/divergent issue agendas to reach outcomes.
- Submit an organizational chart (1 page) and resumes (no page limit) to show staff working on this project.

2. Past Performance (60 POINTS)

Two (2) completed **ATTACHMENT – CAREER SERVICES 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. NARRATIVE (120 POINTS)

Responses will be evaluated on strength of partnerships and collaboration strategy throughout your proposal. Respondents should describe the planned use of, and experience with, evidence-based practices in all applicable questions.

Career services for Adults and Dislocated Workers must be provided by our Career Center Network. The Career Center Network is made up of the Career Services Subrecipient, Career Center Operator, Workforce Partnership, and partners. Refer to **ATTACHMENT – STATEMENT OF WORK** to assist you in answering the questions below as part of your narrative.

Scope of Work Items

Career Services

- Customer Experience
 - Describe how you will conduct intake and determination of eligibility for Adults and Dislocated Workers utilizing the required position of the Intake and Eligibility Specialist, include a workflow that includes intake to enrollment in WIOA.
 - Describe your organization's approach to customer service. What defines a quality customer experience? What, in your perspective, is the point of providing quality customer service? Who is accountable for the quality of service provided to customers? How do you ensure quality of service? How is that different for job seekers and for businesses?
 - Describe examples of times your organization has adapted its service delivery using insights provided by customer service data and/or customer feedback. Where did the feedback come from? Who decided to act on it? How did you decide what changes to make? Were those changes effective? How did you know?
- Access and Locations

- Describe how you will adapt your services to provide remote and virtual access that is responsive to COVID-19 limitations and social distance mandates.
- Do you plan on adding specialized career center service locations that are designed to serve as an access and/or outreach site for a specialized group of the population (i.e., youth, dislocated workers from a particular company, incarcerated individuals in a correctional facility, homeless individuals etc.)?
- How will you partner with other service providers and community-based organizations to offer on-site services to a shared population?
- Outreach and Recruitment
 - Describe your outreach strategy. How will you build or enhance partnerships within each region to reach eligible job seekers and overcome potential challenges in enrollment, especially for the hardest to serve?
 - Explain how your outreach and recruitment process will promote diversity, equity, and inclusion and build trust between your organization and your target communities. How will you recruit and engage BIPOC and LGBTQIA+ community leaders, and business owners? How will you partner with grassroots organizations who demonstrate existing, trusted relationships in the community?
 - Describe your approach and outreach to provide services to individuals leaving the military and their spouses.
- Eligibility and Enrollment
 - Describe how you will create an eligibility certification process that is easy for perspective participants to navigate and prospective participants to navigate and creates a safe space for individuals to disclose sensitive information and self-identify barriers and needs. How will this process ensure compliance and proper documentation by the Intake and Eligibility Specialists? Include any experience implementing the human-centered design process.
 - Describe and provide examples of how you will support individuals with physical, developmental and/or intellectual disabilities in accessing career services.
 - Describe examples of services you will provide to high barrier/disadvantaged populations.
- Orientation, Goals and Assessments
 - Review the **ATTACHMENT – WIOA PROGRAM TRACKS FOR ADULT AND DISLOCATED WORKERS** and describe your process for identifying which track would fit each job seeker's goals, needs and interests based on assessments provided in basic services?
- Referrals, Co-enrollments, and Dual Enrollments
 - Describe your experience and past success engaging in productive partnerships with other organizations to facilitate referrals, co-enrollments, or dual enrollments to other programs. How will you leverage this experience to a) collaborate with other WIOA-Subrecipients when a co- or dual-enrollment is

- needed to provide other services, and b) provide referrals to job seekers who do not qualify for your WIOA program?
- Describe how you will collaborate with the Workforce Partnerships network of youth providers.
- Career Navigation, Participant Engagement and Retention
 - Describe the criteria and explain your experiences in matching Career Navigators with participants. Include any cultural similarities, background, and lived experiences.
 - Describe your participant engagement and retention plan. Use specific examples related to specific populations, core program activities, and follow-up services.
 - Describe and provide an example of your customer flow from outreach through follow-up services.
- Core Program Activities
 - Explain your ability to provide all elements of the two core components, training, and employment services?
 - Describe your strategy for implementing and managing participation as outlined in the **ATTACHMENT – WIOA PROGRAM TRACKS FOR ADULT AND DISLOCATED WORKERS**. How will you connect these core services and activities to participant goals and outcomes? Include any referrals to program or community partners in your response.
- Training
 - How will you engage job seekers to research and attend training programs that meet their interest and skill set? What tools and assessments do you plan to implement?
 - Describe the process for researching training providers (for classroom-based occupational training/apprenticeships) and assessment of readiness and prerequisites. Include any relevant partnerships.
 - Describe how you will manage the training funds in coordination with training providers, other organizations, other programs at the Workforce Partnership to best utilize these funds and to make sure participants are aware of these opportunities.
 - How will you recruit for training participation? Give examples of timelines, strategy, and previous results.
- Supportive Services
 - Describe how your organization will connect job seekers with community resources that help meet ongoing basic needs (i.e., food, housing, transportation, safety), both during the program and in follow-up.
 - Describe established or planned partnerships and resources to leverage funding to meet the in-kind match requirement to provide supportive services.

- Describe your process for paying supportive services to participants in a timely manner.
- Follow Up Services
 - Explain your plan to provide follow-up services to foster continued engagement and provide support, including leadership and professional development, mentoring, career development and job progress, and community resources. What leadership and confidence building skills would you employ to improve self-efficacy?
 - Describe how does your organization will equip job seekers to navigate resources to meet their needs outside WIOA programs and once WIOA programs end.
 - How will you continue to engage with employers after an individual has been placed to ensure follow-up services are supporting their job retention?
- Partnerships and Collaborations
 - Describe and provide examples on how your organization will engage smaller, grassroots organizations.
 - Explain your plan to collaborate with the Career Center Operator to establish local partnerships by entering into a MOU with the Career Center Operator which shall include the four-required career center partner programs such as WIOA Title I-B (Adult, Dislocated Workers and Youth), WIOA Title II (Adult Education and Literacy), WIOA Title III (Wagner-Peyser) and WIOA Title IV (Vocational Rehabilitation).
 - Describe what other partnerships you plan on leveraging with other systems such as, school districts, higher education institutions including community colleges, law enforcement, adult justice systems, local housing programs, community- based organizations, the County of San Diego's Health and Human Service Agency, San Diego County Live Well Centers, mental health and counseling centers, employers, and other organizations that serve adults.
- 2-Gen Approach
 - Describe how you plan to implement a 2-Gen or 3-Gen family-centered program design that provides coordinated services to children and parents which include the following:
 - 100% of job seekers enrolled in programs are supported to secure affordable, quality childcare
 - Family-friendly career centers for parents to be able to access basic and individualized career services
 - Develop a roadmap for “gold standard” service system for working parents
- Performance **ATTACHMENT – PERFORMANCE METRICS**

- Describe your ability to successfully meet standard WIOA state mandated measures. Include descriptions of outcomes in past projects with similar scope of work.
 - Describe your ability to successfully meet performance-based payment measures. Include descriptions of outcomes in past projects with similar scope of work.
 - Describe your strategy for understanding and monitoring the identified enhanced outcome measures. Include a plan to meet enhanced outcome measures based on the required program components and your design strategy. Describe your ability to lead job seekers towards self-sufficiency.
 - Describe your organization's experience with customer service metrics. What metrics do you currently measure? How frequently do you measure them? Who in your organization reviews customer service data? How do metrics influence the way you organize your team and work?
- Efficiency and Measurable Continuous Improvement
 - Ineffective tactics will hinder well thought-out strategies. Decisions to improve delivery of services must be driven by data and evidence-based strategies. Demonstrate how data will be used to drive continuous improvements.

Business Services

Respondents will be evaluated on the following:

Describe your organization's approach to the following standards of business experience and how you will achieve and maintain each of the following.

- **Accountability** – Accountability is about demonstrating ownership and initiative. Commit to delivering high quality business services with regular performance reviews based on shared data. Take action to enhance business services outcomes system wide.
- **Responsiveness** – Minimal average time until your business customers receive the first answer to an inquiry. The issue is not necessarily solved by then. It's simply when customers know that someone has heard them.
- **Integration** – A successful business services team thinks and acts as an integrated network of partners that share a common goal. By organizing ourselves into an ecosystem that businesses can more easily engage with, operations can be streamlined across the entire business service chain, resulting in superior service, responsiveness, and customer experience.
- **Advocacy**– Having a full-time job no longer provides the economic security it once did. The true narrative of low-income work for many in America is one of near constant instability: intermittent work, seasonal work, variable hours, unpredictable schedules. Creating and growing more good jobs is essential to our community. Our business services team infuses job quality consulting into service delivery, to achieve the highest caliber of outcomes for our job seeking clients.
- **Data-driven** – Root outreach and business services strategies in real-time data. Meet the needs of businesses and job seeking customers alike by using up-to-date technologies for talent matching and needs-based programming.

- **Continuous Improvement** – Facilitate a service delivery system that learns from the feedback of customers to challenge current practices and continuously optimize systems. Create environments of innovation to drive measurable improvements.

Respondents will also be evaluated on the following questions:

- Why should we choose your team to operate our business services, and what would you bring to the table?
- What qualifies you for work in business services, to deliver at a high level on the business services portion of this contract?
- Describe how you will respond to business recruitment needs, and how you will infuse motivational coaching into the recruitment process with prospective workers.
- How would you approach serving a business with a large demand for emerging occupations, or other quality opportunities without a “naturally interested” pool of candidates? How would you approach determining the best program for their needs, and how would you make sure not to promise more than we can deliver?
- Describe how you might organize the team of 6 Business Services staff to best serve the needs of the region. Include how you would work with the Workforce Partnership’s business services teams.
- Explain how you would use modern technologies to improve the quality and efficiency of business services.
- Provide your strategy to partner with employers to provide work-based learning. How will you ensure these activities include relevant job skills and meaningful work that leads to quality jobs? What challenges do you anticipate? Include current or proposed employer partnerships and any past outcomes, as applicable. Identify specific job quality standards in your response.
 - Work-Based Opportunities
 - Job Search Assistance
 - Incumbent worker training programs
 - Transitional Jobs
 - On-the-job training programs
 - Customized training programs
 - Apprenticeship promotion
 - Assistance for apprenticeships
 - Recruiting employers to the career centers
 - Direct Placements

4. Project Budget (30 Points)

The Respondent must submit two budgets and narratives: one for the base year of \$3 million and one for the transitional services of \$500,000. **ATTACHMENT – BUDGET, ATTACHMENT – BUDGET NARRATIVE**, and **A COST ALLOCATION PLAN AND NEGOTIATED INDIRECT COST RATE AGREEMENT (NICRA)**. Although the Budgets (and subsequently Invoices) will be reported county wide, the awarded Subrecipient must track expenditures by region 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 in specific line items (i.e., 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 4c - 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. The total of 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 program support costs. Respondents may not exceed the cap of 5% on program support costs. Program 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 program 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. The Workforce Partnership encourages Respondents to use in-kind or revenue streams other than WIOA funding to pay for program support costs. The extent to which a Respondent can meet performance objectives while minimizing support costs will be a factor in the evaluation process.

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 the Workforce Partnership

d) In-Kind and Cash Match Resources

In order to efficiently use WIOA funds and deliver program services to residents and businesses within San Diego County, it is important to leverage a wide range of public and private resources to support program services. For more information on cost sharing or matching, refer to [2 CFR parts 200](#) and [2900](#).

Respondents are required to provide a 10% in-kind or cash match of the total budgeted amount on the budget (5% for Transition Services).

In-kind and cash match resources can support any budget item as long as it supports program activities. Cash match is defined as a contribution of funds made available to the Respondents to be used specifically for program activities. Respondents are required to assign a monetary value to any in-kind contributions. Examples of in-kind resources include but are not limited to:

- Staff time from lead and/or partner agencies (directly related to jobseeker or business customers).
- Facilities/Infrastructure (where services are provided).
- Participant expenses (e.g., internship/work experience wages, incentives, supportive services, tuition, books, fees, tools, or clothing for employment)
- Equipment (directly related to services to jobseeker or business customers).
- Outreach and/or media support.

These in-kind or cash-match resources must directly support the proposed program activities and should be documented with a Letter of Commitment, MOU, or other documentation. The documentation of in-kind or cash-match resources will include agreed-upon details of the support, that includes the amount to be lent or the services or supplies to be provided, the terms and goals of the agreement, and each parties roles and responsibilities in the agreement.

e) Subcontractors

If applicable, the Respondent must describe its plan to subcontract any portion of the services in Section II – Narrative. 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 200 and 2 CFR 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.
 - 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?
 - Do the proposed costs seem reasonable?
 - Did the Respondent not exceed the \$3,000 (\$500 for Transition Services) maximum Cost per Participant in the career services budget?
 - Did the Respondent provide each of the Required Staff Positions defined in Section 5?
 - Did the Respondent provide the minimal 10% on In-Kind /Cash Match of the TOTAL contract amount? (5% for Transition Services)

- Did the Respondent allocate a living wage for each of their staff at \$18.66 per hour?
- Did the Respondent not exceed the 5% on Program Support costs?

5. Staffing (15 Points)

The Workforce Partnership requires that the following positions and corresponding functions be fulfilled. For budgeting purposes, please use the titles provided below. All staff must be trained to recognize trauma and mental health needs, incorporate trauma informed approaches in case management, and make appropriate emergent referrals when necessary.

a) Career Services:

- **3 Intake and Eligibility Specialists:** The IES will conduct outreach, recruitment activities and conduct intake and eligibility.
- **20 Career Navigators:** The Career Navigator will provide case management for participants to facilitate growth and development, participation in core program activities, and support achievement of performance outcomes. The Career Navigator will work in partnership with the Business Service Representative to provide a supportive and comprehensive case management strategy.
- **6 Career Navigators (Transition Services – 1st year only):** The Career Navigator will provide case management for participants that are already on caseload with the current provider, to facilitate the growth and development, participation in core program activities, and support achievement of performance outcomes. The Career Navigator will work in partnership with the Business Service Representative to provide a supportive and comprehensive case management strategy.
- **2 Quality Assurance Specialists:** The specialist should be the main staff assigned to verify eligibility, conduct internal monitoring, and ensure compliance with the Workforce Partnership Operations Manual, understand CalJOBS system requirements, run CalJOBS reports and verify CalJOBS performance data. This person would also be the first point of contact for coordinating trainings with the Workforce Partnership, data change requests, and additional programmatic requirements in partnership with the Career Navigator and the Career Center Managers.

b) Business Services:

- **6 Business Service Representatives (BSRs):** The BSRs primary functions are to engage industries and employers with both the program and participants and to coordinate all work-related activities. BSRs will facilitate OJTs, CTs, employer driven occupational skills training, apprenticeships, and job placements. The BSR will work with the Career Navigator as part of a comprehensive case management system. The BSR will coordinate the employer driven performance outcomes of Effectiveness in Serving Employers and Retention with the Same Employer. They will also act as the main liaison for the Career and Partner Portal system requirements. The 6 BSRs will conduct the following emphasis:
 - 2 OJT Specialists (Priority Sector Emphasis)
 - 2 CET/CT Training Specialists (Priority Sector Emphasis)
 - 2 Placement Specialists (Priority Sector Emphasis)

Respondents' BSR staff will partner with the Workforce Partnership's Business Services Representative as part of a business services collaborative to delineate roles. During contract negotiations, specific Business Services expectations and outcomes will be put in place. Respondents must budget sufficient BSR staff to serve youth at all career center locations.

c) Training Services

- **1 Training Development Coordinator:** The Training Development Coordinator will be responsible for leading the development of Contracted Education Training and Customized Trainings. They will work closely with the center managers and other partner organizations to identify common training requests from customers and will in turn outreach to training providers and employers to develop those training opportunities using WIOA training funds. The training Development Coordinator will also serve as the liaison between Workforce Partnership's Sector Initiatives training and the Career Services Subrecipient.
- **1 Training Funds Coordinator:** The Training Funds Coordinator is responsible for tracking and reconciling training expenditures. Produces regular reporting of outstanding balances.

d) Communications

- **1 Career Center Brand Manager:** The career center brand manager is responsible for maintaining branding, marketing and communications efforts and cross-functional collaboration across the career center network to translate organizational goals into actionable strategies.

This role will partner with the Workforce Partnership marketing & communications team on various projects related to fulfilling the overall marketing strategy and execution. They will oversee a variety of internal and external communication efforts to ensure the brand's voice, guidelines, and all content and creative aspects of the brand align to the company's communication objectives and business needs. This role will rotate locations working remotely at various career center locations and at the San Diego Workforce Partnership headquarters—all within San Diego County.

Respondents will also be evaluated on the following questions:

- For the required staff positions listed above, please explain how each position and its responsibilities will be met.
- What kind of formal and/or lived experience does your staff bring to your program?
- Please indicate current/proposed staff languages spoken and the coordination of services in multiple languages.
- How will you ensure participants feel engaged and supported, as well as staff feel equipped to handle the proposed caseload and program design? Explain your caseload and staffing ratios. Be sure to include details about previous experience with case management and data tracking tools.
- Describe your staff and volunteer training process to ensure all participants receive consistent, trauma-informed, and high-quality services. Include examples of utilizing resources, building trust and community engagement

6. Zoom Interview (45 Points)

Respondents must score a minimum of 204 points (80% of the total available points, excluding the zoom interview section) to proceed to interview phase. 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 a 1.5-hour interview time slot via email. The interview will be held remotely, and the link provided in the email notification.

The 1.5-hour allotments allow 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 28, 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 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 Board of Directors, do not require separate board approval.

E. COOLING OFF PERIOD

The Workforce Partnership and the Board of Directors shall not approve or contract with, and will reject any 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 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** 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.

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 the respondent must be clearly marked and identified by the 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 the 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). The contractor shall provide the Workforce Partnership a certificate evidencing such insurance. See **EXHIBIT – CERTIFICATE OF INSURANCE (COI) EXAMPLE**.

B. CONTRACTUAL AGREEMENT TEMPLATE

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

C. GENERAL PROVISIONS

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

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 it 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 Services RFP - Past Performance Questionnaire
- Attachment - Performance Metrics
- Attachment - Proposal Checklist
- Attachment - Statement of Qualifications (SOQ)
- Attachment - Statement of Work
- Attachment - Technology and System Requirements
- Attachment - WIOA Program Tracks for Adult and Dislocated Workers

Exhibit - Certificate of Insurance (COI) Example