

Employ Milwaukee, Inc.

Wisconsin Workforce Development Area #2



REQUEST FOR PROPOSALS

Released February 3, 2020

WIOA Title 1B

**Workforce Services –
Adult and Dislocated Worker**

FUNDING PERIOD: JULY 1, 2020 – JUNE 30, 2021*

*One-year initial contract with possibility for three one-year extensions contingent upon funding and performance.

RESPONSES DUE: FRIDAY, MARCH 20, 2020, 4:00pm C.S.T.

Proposers Conference:

Tuesday, February 11, 2020 at 9:00am.

Employ Milwaukee, Inc.

2342 N. 27th Street

Milwaukee, WI 53210

****Attendance is not mandatory, but highly encouraged****

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Employ Milwaukee's WIOA Title I Adult/Dislocated Worker Program is funded by Workforce Innovation and Opportunity Act grants provided by the US Department of Labor (USDOL). Any agreements resulting from this RFP may be funded by Employ Milwaukee through the WIOA Adult and Dislocated Worker grants provided by USDOL. The subrecipient must comply with all applicable regulations and the terms and conditions of the WIOA grant provided by USDOL.

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I. Purpose, Funding and Schedule

A. Purpose of Request for Proposal

Employ Milwaukee, Inc. (EMI) announces the release of Workforce Innovation and Opportunity Act (WIOA) funding to organizations providing workforce development services for businesses and job seekers within high demand sector industries and occupations in the Southeastern Wisconsin region. The purpose of this Request for Proposals (RFP) is to solicit qualified vendors to submit innovative proposals for the delivery of comprehensive WIOA Title 1B services to the Adult and Dislocated Worker populations within Milwaukee County, WI.

B. Overview of Employ Milwaukee, Inc.

Employ Milwaukee, Inc. (EMI), www.employmilwaukee.org is the local Workforce Development Board (WDB) serving Milwaukee County, WI. As the WDB for Milwaukee County, EMI has programmatic and administrative responsibility for services of the Workforce Innovation and Opportunity Act (WIOA) provided in Wisconsin's Workforce Development Area (WDA) #2 (Milwaukee County, WI). EMI carries forward its work around equity, linking workforce and economic development, and providing services – both directly and as a contracted partner. The following values serve as a guiding force for the work EMI does, and how it will do it with clients, partners, and employers: People-centered, rooted in equity and opportunity, networked and intentional partnerships, regionally responsive, and growth and system-oriented.

To this end, Employ Milwaukee is increasingly applying an intentional, place-based approach to delivering education, training, employability skills, and work-based learning at the neighborhood level to advance strong and supportive communities. In doing so, EMI and its service providers have the responsibility and capability to serve as a catalyst for community-level progress by strengthening the public workforce system and the local network of employment and training service providers. EMI's vision is to establish a system that is designed to meet residents, participants and businesses where they are.

C. Service delivery models

EMI is seeking innovative proposals that reflect these articulated values and vision. After reviewing service models across the county, EMI has selected the following service models as frameworks for its upcoming WIOA program year:

Service Model 1: Workforce Services provided to general population located at AJC **and** contracted partnership with Delegate Agencies

Service Model 2: Workforce Services provided to general population located at AJC **and** contracted partnership with Delegate Agencies **and enhanced** Career Pathways Training

Respondents must choose one model and submit the corresponding application, narrative, and budget information.

All models must include service delivery to the general population through the **American Job Center (AJC)**. Respondents are encouraged to partner with community- and faith-based organizations and quality training providers. Delegate agencies may not be entities listed on the State of Wisconsin Department of Workforce Development (DWD) Eligible Training Provider List (ETPL).

[**NOTE:** A separate Request for Proposal will be issued in the spring of 2020 for a Regional One Stop Operator (OSO) with services to begin July 1, 2020. The Regional OSO will provide services to WDA 2, Employ Milwaukee, in collaboration with WDA 1 (Kenosha, Racine, & Walworth - Southeast Wisconsin Workforce Development Board), and WDA 3 (Waukesha, Ozaukee, Washington - WOW Workforce Development Board).

Additionally, Employ Milwaukee will be posting an application for organizations to be identified as an American Job Center (AJC) in May 2020. Applicants submitting proposals to this RFP can then submit an application to provide services within an AJC.]

Model 1: Workforce Services provided to general population at AJC and contracted partnership with Delegate Agencies

Selected service providers will be responsible for the provision of career and training services for Adult and Dislocated Workers at American Job Center location(s) as defined by WIOA Title I. WIOA provides for a workforce system that is universally accessible, customer centered, and training that is career driven. Training is supported through an expansive Eligible Training Provider List (ETPL). WIOA also provides enhanced access and flexibility for work-based training options, such as a Registered Apprenticeship (RA), on-the-job training, customized training, and incumbent worker training.

Additionally, the selected service providers will also be responsible for the provision of career and training services for partnering with and funding **Delegate Agencies** to provide services to job seekers and businesses. Delegate Agencies will differ from American Job Centers in that they are smaller and may serve a smaller geographic area or special population. Delegate agencies must be located in and/or demonstrate a capacity to serve a preponderance of residents from high poverty areas and/or target populations. See Section III. G. for specific community areas. A Delegate Agency cannot be a training provider.

Model 2: Workforce Services provided to general population at AJC and contracted partnership with Delegate Agencies and Career Pathways Training

Selected service provider will be responsible for the provision of career and training services for Adult and Dislocated Workers at American Job Center location(s) as defined by WIOA Title I, partnering and funding with Delegate Agencies, in addition to developing and delivering an enhanced **Career Pathways Training** track delivered via Occupational Training or Bridge Programming. Career Pathways Training Programs are typically cohort-based, skills training programs that are demand driven within focused

industry sectors. Bridge Programs are designed to serve individuals with basic skills deficiency in literacy and numeracy and/or limited English skills.

The selected Career Pathways Training provider must demonstrate strong employer relationships that ultimately lead to career advancement opportunities for job seekers through a program curriculum that offers an industry-recognized credential. The Career Pathways Training must reflect the needs of the sector, whether this is in attracting new workers, training the existing workforce, or advancing incumbent workers. The overall goal is to improve the job seeker's employment prospects and the industry's competitiveness to promote economic development for the region.

Occupational Training

Occupational Training Programs are cohort-based, skills training programs that should be demand driven within EMI's focus sectors and connect job seekers to employment.

Occupational Training Programs will offer advanced vocational training instruction to job seekers and eliminate the need to issue Individual Training Account (ITAs) vouchers to participants. EMI seeks proposals from occupational training programs that have a strong track record of:

- Equipping participants with the skills and credentials necessary to secure middle-skilled employment along a career pathway;
- Placing participants in training-related occupations that exceed EMI's WIOA performance wage outcomes and current average placement wage rates of \$14 per hour for adults and \$20 per hour for dislocated workers;
- Working with employers to inform the training curriculum and program design; and
- Tracking job retention for up to one year after placement.

Bridge Programs

Bridge Programs transition low-skilled individuals to either advanced education or training, or entry-level jobs. Bridge Programs target participants with basic skills deficiencies in literacy and numeracy, (i.e., those whose test scores are between fifth and below ninth grade levels, as indicated by the Test of Adult Basic Education (TABE) or other assessment tools. The objective is to advance participants to a ninth-grade level or above as required for admission to many technical colleges and occupational training programs. EMI recognizes that in the open-exit pathway model, participants may choose to exit the pathway right after the bridge program to pursue employment. EMI seeks proposals from organizations that have a strong track record of:

- Addressing low-skilled individuals' literacy and numeracy skills and advancing them to at least a 9.0 level in literacy and numeracy;
- Contextualizing the adult education curriculum to a specific industry and occupation that is aligned with EMI's priority sectors;
- Transitioning bridge program completers to advanced training at either a technical college or a vocational training institution; and
- Placing participants in training-related jobs and tracking retention for up to one

year after placement.

Service Models	Example
Model 1 Workforce Services located at American Job Center (AJC) and contracted partnership with Delegate Agencies	Proposal to serve X number of participants from existing Job Center locations or proposed AJC site (predominate training tool will be the issuance of individual training accounts) and serve X number of participants from community-based organizations.
Model 2 Workforce Services located at AJC and contracted partnership with Delegate Agencies and Career Pathways Training (Occupational Training & Bridge Programs)	Proposal to serve X number of participants from existing Job Center locations or proposed AJC site (predominate training tool will be the issuance of individual training accounts) and serve X number of participants from community-based organizations and Recruit, enroll, partner with ETPL training provider, and place X number of participants in Career Pathways Training for specific in-demand sectors and occupations.

D. Available Funding and Performance Period

The primary funding source for the services described herein are available through WIOA, therefore the selected service provider must comply with all federal, state, and local WIOA programmatic requirements including, legislation, rules, regulations and policies.

EMI will award WIOA funds to entities that demonstrate an ability to effectively deliver and manage services as described herein. It is EMI's expectation that respondents will be proficient in their understanding of WIOA services and subsequent regulations. EMI will provide technical assistance and training on WIOA regulations and policies. All proposals must be comprehensive and address the full scope of services or demonstrate collaboration with other entities that together will deliver the full scope of services contemplated by this RFP.

EMI anticipates funding grant agreements to be effective July 1, 2020 through June 30, 2021. EMI reserves the right to renew contract agreements for up to three additional one-year periods based on the service provider's achievement of benchmarks, funding availability, ability to leverage funds, compliance with WIOA and the renewal's conformity with EMI's vision for the Milwaukee County Workforce System.

WIOA funding for this solicitation is categorized by the two job seeker populations: Adult and Dislocated Workers. EMI anticipates reserving approximately \$600,000 in Adult funds and \$300,000 in Dislocated Worker funding for grants made under this solicitation. Additionally, EMI anticipates reserving approximately the following training funds in these two training types:

	Individual Training Accounts	Career Pathways
WIOA Adult	\$ 210,000	\$ 300,000
WIOA Dislocated Worker	\$ 150,000	\$ 150,000
Total	\$ 360,000	\$ 450,000

EMI plans to award several contracts and retains the flexibility to adjust funding levels between the training types. Additional funds received by EMI may be disbursed by expanding existing programs or by consideration of proposals not initially funded under this RFP. These decisions shall be at the discretion of the Employ Milwaukee Workforce Development Board.

E. Contract Type

Contracts executed as a result of this RFP process will be paid through cost reimbursement unless otherwise specified. Final contracts will also be subject to any changes in legislation, regulations or policies promulgated by the funding sources. EMI reserves the right to vary or change the terms of any contract executed as a result of this RFP, including funding levels, the scope of services, performance standards, referral sources and period of performance, as it deems necessary.

F. Tentative Schedule of Events

RFP Release	February 3, 2020
Proposer's Conference – Adult & Dislocated Worker	February 11, 2020, 9:00 am
Proposer Question Deadline	February 28, 2020
Proposer Question Answer posted	March 6, 2020
Proposal Submission Deadline	March 20, 2020, 4 pm CST
Proposer's Required to be Available via Phone For Questions	April 2, 2020
Finalist Presentations to Program Committee	April 20, 2020
Executive Committee Approval	May 1, 2020
Contract Start Date	July 1, 2020

Employ Milwaukee reserves the right to modify this schedule at any time it deems necessary.

EMI Program staff will present the RFP requirements and accept questions during the Proposer's Conference to offer technical assistance to respondents at Employ Milwaukee's corporate headquarters, located at 2342 N. 27th Street, Milwaukee, WI 53210. Entities may submit questions to procurement@employmilwaukee.org until **February 28, 2020 at 4:00 pm CT**. A response to all questions

will be available no later than close of business on March 6, 2020 and posted at www.employmilwaukee.org. If it becomes necessary to revise any part of this RFP, an addendum will also be posted on the EMI website.

G. Eligible Respondents

Any governmental, not-for-profit, educational institution or for-profit entity properly operating in accordance with federal, state and local laws with a minimum of three years' experience implementing an adult and/or dislocated workforce program, may submit a proposal for consideration. Additionally, respondents must be eligible to do business within the City of Milwaukee, Milwaukee County, and/or the State of Wisconsin. Further, to receive consideration, a respondent must have a direct service location within Milwaukee County or identify a location in their proposal that will be secured for occupancy as of the grant agreement start date if the respondent is selected and awarded a grant.

It is EMI's expectation that Respondents and their collaborators offer family-supporting wages and competitive benefits to their employees.

Respondents may submit proposals in which subcontractors are identified to provide program components. Respondents may also identify organizations with which they will collaborate to enhance the program design. **Note:** A joint proposal submission is a collaborative submission by two or more entities. A joint proposal submission should clearly provide the following information in the narrative portions of the proposal:

- Identify the lead agency and the other agency submitting the proposal;
- State the roles and responsibilities of each collaborator;
- Include an organizational chart for each organization and for the collaboration;
- Describe how funds will be allocated within the respective agencies;
- Identify the percentage of each partner's fiscal responsibility; and
- Identify the qualified fiscal agent for the collaborative partnership.

Entities are ineligible if they: 1) are currently barred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by a Federal or State department/agency or EMI; 2) have existing grants with any State, County or City agency that are suspended or otherwise not in good standing; or 3) are not in compliance with the Wisconsin Department of Revenue or the Federal Internal Revenue Service requirements.

Delegate agencies may not be entities listed on the State of Wisconsin Eligible Training Provider List (ETPL).

II. Partnership Model

A. Program Team

EMI's Program Team will serve as the fiscal agent and program contract manager for the service

providers through its role of managing, monitoring, and providing technical assistance, training, and oversight for WIOA Title 1 adult, dislocated worker, and youth programs. The Program Team monitors compliance with all federal, state, and local rules and regulations and contractual obligations, communicates policy changes to service providers, and provides routine training and technical and capacity building assistance. The Program Team receives technical support from DWD and other EMI departments (Business Solutions, Business Intelligence, Planning, etc.).

B. Business Intelligence Team

EMI's Business Intelligence Team is responsible for maintaining data quality and integrity, including but not limited to: EMI's Efforts to Outcomes (ETO) participant and employer data collection system, DWD's Automated System Support for Employment and Training (ASSET), and additional systems as they come under the purview of EMI. The Business Intelligence team is further responsible for upgrades and changes to the ETO system, ETO training, and agency-wide reporting. Data Analysts monitor the quality of data entry and provide technical assistance to service providers as needed. These functions ensure that program and client services captured in training record systems properly conform to regulations.

C. Business Solutions Team

EMI's Business Solutions Team (BST) cultivates employer relationships, provides a suite of services to meet the employer's workforce needs, and create opportunities for employers to engage and influence the work of our ecosystem. Examples of these services include managing customized talent solutions projects, brokering partnerships on behalf of the workforce system, reviewing labor market information, providing opportunities for employers to connect with talent pipelines, and providing varied types of work-based learning opportunities such as incumbent worker training, customized training, on the job training, internships, and apprenticeships.

BST will partner with the selected service providers, who will be responsible for the career navigator functions with individuals participating in work-based learning opportunities and coordinate employer access to the American Job Center system. Conversely, as employers indicate needs to downsize staff, BST is the initial point of contact to employers to offer Rapid Response Services and partners with the service provider who is responsible for enrolling interested and qualified participants in the Dislocated Worker program.

Selected service providers are highly encouraged to interface with and assist employers. Service providers will not be expected to employ an outside sales type of business solutions representative. Interactions between the service provider and employers are more transactional to provide entry point services rather than consultative partnerships. Some examples are listed below:

- Service employers who walk-in to the office by providing Job Center of Wisconsin information;
- Schedule onsite recruitment events per employer request; and
- Direct candidates to employment opportunities at the Job Center of Wisconsin and send messages to employers to market qualified participants.

EMI's Sector Specialists will provide additional technical assistance and communication, at the direction of the Business Solutions Manager. Job Developers from the selected service provider are expected to

participate in monthly Job Developer Cooperative meetings that EMI facilitates to ensure maximum service delivery to employers while reducing duplication of outreach and efforts.

EMI analyzes labor market information and works closely with local employers to identify industries and occupations that are stable and growing. EMI prioritizes employers that provide Milwaukee County job seekers a livable and fair wage, family-friendly benefits, a safe, healthy, and inclusive environment, and advancement opportunities. EMI has identified seven (7) high-growth and high-demand industry sectors that meet these qualifications and will receive a majority of EMI's employment and training resources: Manufacturing, Construction, Healthcare, Information Technology, Financial Services, Retail and Hospitality, and Transportation and Logistics.

D. One-Stop Operator & Required Partners

As noted, a Request for Proposals will be issued by WDAs 1,2, & 3 to identify a Regional One-Stop Operator (OSO) for the period of July 1, 2020 – June 30, 2021. EMI expects that the service provider chosen through this RFP will participate actively with EMI and with the Regional OSO in improving the efficacy of the local workforce ecosystem. The term "ecosystem" is intentionally and consistently used by EMI to reinforce the reality that meeting the diverse needs of job seekers and employers in Milwaukee County requires healthy interaction between a community of partnering entities – including each of the WIOA Required Partners, the municipalities within Milwaukee County, Milwaukee County, community-based providers, economic development professionals working at the county level and on behalf of specific neighborhoods, employers of every size from every sector of the economy, diverse education providers working with students at every academic level, occupational trainers, and many more. The service provider chosen through this process must demonstrate a respect for the diverse actors interacting in this ecosystem, an understanding of their interconnectivity, as well as a willingness to actively engage and be engaged by these diverse actors in order to meet the needs of individuals seeking work and building careers, and the needs of businesses that employ these individuals.

III. Scope of Work

A. WIOA Adult and Dislocated Worker Programs

The Workforce Innovation and Opportunity Act defines the required activities authorized for Adults and Dislocated Workers and the selected service provider will be responsible for the provision of those programs as defined by WIOA Title I. Respondents must have knowledge of WIOA to understand the scope of authorized activities and will have familiarized themselves with a variety of online resources such as <https://dwd.wisconsin.gov/wioa/> and <https://www.dol.gov>.

The WIOA Adult and Dislocated Worker formula programs, in addition with the Wagner-Peyser (WP) Employment Service, are foundational pieces of the one-stop delivery system. Under WIOA, adults and dislocated workers may access career services and training services. WIOA provides for a workforce system that is universally accessible, customer centered, and training that is job driven. Training is supported through an expansive Eligible Training Provider List (ETPL). WIOA also provides enhanced

access and flexibility for work-based training options, such a Registered Apprenticeship (RA), on-the-job training, customized training, and incumbent worker training.

WIOA Adult and Dislocated Worker activities includes but is not limited to:

- Outreach and intake
- Eligibility determination
- Initial assessment of skills
- Supportive service needs
- Job search and placement assistance
- Career counseling
- Recruitment and other business services for employers
- Referrals to other One-Stop partner programs and other available programs in the community
- Information and assistance with establishing eligibility for financial aid and assistance for educational programs other than WIOA
- Development of an Individual Employment Plan
- Adult education and literacy activities and follow-up services

B. Required Program Design Elements

- Integrated Service Delivery (ISD) – The Service Provider will seamlessly integrate delivery of services provided in the WIOA funding categories with services provided by other WIOA required partners and non-WIOA funded service providers. ISD braids relevant resources and services of all EMI and American Job Center system partners to seamlessly address the training and employment needs of job seekers and employers.
- Innovative Design – The Service Provider will enhance and add value to the Milwaukee County American Job Center system by building on its best practices with innovation and demand-driven design, and expand those best practices throughout the ecosystem.
- Technology – The Service Provider will continually develop staff knowledge, experience and ability to use computerized and assisted device technology to best communicate with customers at EMI and American Job Center sites. Service Provider staff will be knowledgeable about online tools and resources.
- Community Outreach – The Service Provider will meet job seekers in their communities and may choose to partner with Delegate Agencies at embedded locations in high unemployment/ high poverty neighborhoods. Embedded staff will strengthen connections between EMI, the community, job seekers, and employers. Services may also be provided in other community-based locations as needed in order to participate in community activities such as job fairs and other hiring events.
- Work Based Learning – The Service Provider will work with the EMI Business Solutions Team to identify and connect job ready participants to work-based learning opportunities tied to specific career pathways.
- Career Pathways – Service Provider staff will be knowledgeable on career pathways, labor market information, employment trends, in-demand jobs, education, training, employment processes, and provision of intensive career navigator services. This knowledge level will include

the ability to access labor market information and trends. Each participant receiving individualized career services will have a written individual employment plan that identifies specific steps and activities that will develop job ready candidates for placement. The Service Provider will work closely with the Business Solutions team to create a talent pipeline for high demand jobs.

- Trauma Informed Service – Service Provider staff will recognize the widespread impact of trauma and understands the potential paths for recovery, recognizes the signs and symptoms of trauma in clients, families, staff and others involved in the system, and responds by fully integrating knowledge about trauma into policies, procedures, and service delivery model and seeks actively to resist re-traumatization.

C. Required Service Delivery Elements

The following contains a list of service delivery components that must be provided, regardless of the model. All respondent programs **MUST**:

- Conduct creative outreach and recruitment activities to identify participants for the program.
- Complete a thorough intake interview and collect eligibility documentation for enrollment into the program utilizing the EMI common intake and program supplemental forms.
- Conduct mandatory individual assessments that are comprehensive in nature and can accurately identify a plan to provide services that are necessary and appropriate for eligible participants to be successful in completing a training program that matches career interests in demand occupations.
- Develop Individual Employability Plans (IEPs) that address the needs identified through comprehensive assessment, in a manner that is appropriate to the individual and follows clear timelines in which to be completed.
- Provide or refer to supportive services as appropriate and identified in the IEP.
- Define the terms of participant success for each service delivered.
- Maintain contact and active engagement with participants to ensure there are no gaps in service.
- Maintain progress of participant activities using the Wisconsin Department of Workforce Development tracking system (ASSET) and Employ Milwaukee's Efforts to Outcome System (ETO).
- Utilize resources made available by DWD's Wisconomy, the US DOL and EMI to effectively deliver services to adults and dislocated workers.
- Provide follow-up services for a minimum of one year after exit.
- Comply with the Uniform Administrative Requirements, Cost Principles, and Audit Requirements as delineated in 2 CFR Part: 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements; Final Rule. And 2 CFR Part 2900: DOL Exceptions to 2 CFR Part 200.

Program models are expected to offer WIOA services throughout the year. EMI will maintain control and administrative oversight of WIOA training funds for both the WIOA Adult and Dislocated Worker program. It is expected that the contractor will work to leverage other funding resources by, at a minimum, establishing a method to advise and refer WIOA participants to other programs for services.

D. WIOA Performance Outcomes

WIOA established a comprehensive performance accountability system in order to optimize the return on investment of federal funds and to assess the effectiveness of local areas. Selected respondents will be required to meet performance measures based on the new WIOA rates EMI negotiates with DWD each year.

E. Staffing

All service provider staff are required to possess the following general skills and knowledge:

- Effective communication skills, both oral and written as needed for each respective position.
- Commitment to work towards the development of higher levels of Multicultural Competency.
- Knowledge of Career Pathways for high demand jobs and current Labor Market data and able to share the information to assist participants in making career decisions.
- Proficient in identifying job readiness skill shortfalls and assisting participants to gain the necessary skills for employment.
- Maintain timely eligibility determination, documentation and reporting requirements per federal, state and local regulations and policies.
- Have empathy, a positive attitude and excellent relationship building skills.
- Be open to work as a team with external and internal partners and possess effective problem-solving skills.
- Ability to coordinate with the workforce ecosystem to maximize the overall objectives of EMI, while meeting program goals.
- Focus on building a “talent pipeline” by assisting job seekers with job readiness skills, job search skills, and training opportunities.

In order to limit confusion and develop consistency across service and program types, staff positions are limited to the following titles (although respondents are not required to include each position type within the service delivery plan):

1. Program Director
2. Quality Assurance Manager
3. Quality Assurance Specialist
4. Operations Supervisor or Team Lead
5. Career Navigator

F. Delegate Agencies Target Areas

Delegate Agencies provide recruitment services to job seekers and placement services to businesses, differing from American Job Centers in that they are smaller, coordinate with the Adult and Dislocated Worker service provider for data entry and case management activities, and may serve a smaller geographic area or special population. They also serve business customers and develop employer relationships and job leads for their job seeker population. Delegate agencies must be located in and/or demonstrate a capacity to serve a preponderance of residents from high poverty areas and/or target

population.

For the geographic/ community target, EMI has identified specific community areas as high poverty (see Table 1).

The following zip codes in the City of Milwaukee have 30% or more households earning poverty level income. The 2019 Federal poverty level for a family of four (4) is \$25,750. (Source: <https://aspe.hhs.gov/poverty-guidelines>)

Table 1: High Poverty Level Zip Codes, City of Milwaukee	
<i>City of Milwaukee Zip Code</i>	<i>Percent of Households earning less than \$25,750</i>
53202	27.0%
53203	26.5%
53204	45.8%
53205	52.9%
53206	54.2%
53207	18.4%
53208	40.8%
53209	37.9%
53210	39.2%
53211	23.6%
53212	38.2%
53214	26.7%
53215	33.9%
53216	37.5%
53218	33.7%
53219	23.7%
53220	23.4%
53221	22.5%
53222	24.1%
53223	28.5%
53224	25.1%
53225	26.8%
53227	22.9%
53228	19.1%
53233	69.2%
Source: 2017 American Community Survey 5-Year Estimates	

G. Career Pathways Training (Occupational Training and Bridge Programs)

Career Pathways Training improves the capacity and impact of the WIOA system by equipping job

seekers with the industry-related skills needed to secure employment and enter into a career pathway. EMI seeks Career Pathways Training that is demand driven, informed by the industry and/or employer partners, and directly linked to relevant and current job openings.

A **primary objective of Career Pathways Training** is to help individuals obtain the skills necessary for employment along a career path. In pursuit of this objective, Career Pathways Training providers will develop a service delivery model that is industry-focused, demand driven, and business oriented – providing workforce preparation and skills training grounded in both the employment needs of businesses and the developmental needs of the job seekers and/or employees. Given the limited availability of ITAs, EMI seeks cost-effective models that provide job seekers with the vocational skills needed to secure employment that exceeds EMI’s WIOA performance wage outcomes.

Career Pathways Training providers will provide program participants with the full array of supportive services available through WIOA. EMI seeks to invest in Career Pathways Training that can better the number of individuals trained.

Under WIOA, “Career Pathways” is defined as a combination of rigorous and high-quality education, training, and other services that:

- Aligns with the skill needs of industries in the economy of the State or regional economy involved;
- Prepares an individual to be successful in any of a full range of secondary or postsecondary education options, including registered apprenticeships;
- Includes counseling to support an individual in achieving the individual’s education and career goals;
- Includes, as appropriate, education offered concurrently with and in the same context workforce preparation activities and training for a specific occupation or occupational cluster; and
- Organizes education, training, and other services to meet the particular needs of an individual in a manner that accelerates the educational and career advancement of the individual to the extent practicable.

Career Pathways Training will allow job seekers to combine work and education while obtaining in-demand postsecondary credentials. Career Pathways Training programs that can best articulate their program design and how participants achieve both their educational and occupational goals will receive highest priority. EMI seeks proposals that best demonstrate their ability and experience in providing skill-deficient individuals with career coaching, training, and transition services to further education and employment.

Demand driven workforce development models are those that incorporate the workforce demands of industry partners such as succession planning, business expansion, or current job openings. Programs are expected to align their curriculum and program design with their business partner’s recruiting process and within EMI’s seven (7) high-growth and high-demand key industries: 1) Manufacturing; 2) Healthcare; 3) Hospitality; 4) Information Technology; 5) Construction; 6) Retail and Hospitality; and 7) Transportation, Distribution and Logistics. EMI will only select Career Pathways Training programs that

target occupations within the seven (7) key industries above.

Occupational Training Program

Occupational Training Programs must possess an understanding of their job seekers' needs while keeping current on employment trends of its industry partners. In order to ensure its ongoing success and maintain relevancy, Occupational Training program staff must be knowledgeable about business needs within the sector as well as solutions to fill those needs. EMI will evaluate staff's expertise (including trainers, instructors, and job developers) in delivering training programs and connecting program completers to employment. Occupational Training Programs are expected to incorporate their industry expertise into the training and offer the skills and credentials that their business partners value as essential for employment. Occupational Training Programs will be expected to have established partnerships with businesses (as demonstrated through at least three letters of support that speak to specific business-related services) and a demonstrated track record of helping those businesses fill their employment needs.

Bridge Programs

As a program that connects low-skilled job seekers to employment, Bridge Programs are designed to serve individuals who are basic-skills deficient and address the educational barriers that prevent job seekers from entering into training and employment. Specifically, Bridge Programs are expected to only enroll participants who test at a 5.0 grade level in reading or math, and advance them to at least 9.0 grade levels. All Bridge Programs will be expected to track outcomes in both reading and math levels as indicated by assessment tools. Bridge Programs must contextualize their curriculum to a specific industry and occupation.

Upon completion of the Bridge Program, participants should reach the 9.0 grade level in reading or math and be transitioned to post-secondary education/training. Or, if they exit the pathway after the Bridge Program, be transitioned to entry-level employment. Bridge Programs must establish partnerships with quality training providers, technical colleges or post-secondary educational institutions as demonstrated through the required letters of support and/or memorandums of understanding. Bridge Program providers must follow participants through job-placement and retention. Bridge Programs will also be expected to have established partnerships with businesses that can inform the program model and that will hire program completers.

The Bridge Program training must be accredited by an accrediting body and the Bridge Program must be aligned with the official "Bridge Program Definition" recognized by the Wisconsin Department of Public Instruction (DPI) and the Wisconsin Technical College System (WTCS). Minority-owned and women-owned businesses are encouraged to apply.

IV. Submission Requirements and Instructions

The RFP will be available to download from the EMI website:

<https://www.employmilwaukee.org/Employ-Milwaukee/Partners/RFPs.htm> If you are unable to access or download the RFP, please contact procurement@employmilwaukee.org or (414) 270-1700.

A. Proposal Submission

Proposals must be received by Employ Milwaukee no later than **4:00 pm (CT) on March 20, 2020**. Please submit (2) hard copy proposals with original signature(s) **and** a searchable electronic version (PDF) of the proposal on a jump drive:

ATTN: Peter Coffaro, Vice President of Programs and Business Solutions
Employ Milwaukee, Inc.
2342 N. 27th Street
Milwaukee, WI 53210

Formatting

Proposals must be typed in Microsoft Word in a 12-point font, double-spaced, with pages numbered at the bottom of each page, along with the organization's name.

Required Proposal Outline and Components

Each respondent is expected to submit a proposal in a format suitable for ease of review. ***To maintain comparability of proposals, respondents must follow the outline below including all section and sub-section headings exactly as they appear, including all proposal details and within the maximum page limits for each section as specified below.***

Narrative	Page Maximum	Notes
Agency Identification - Form A		
Proposal Cover Letter	1	Not counted toward max
Qualifications & Experience	3	
Service Delivery Plan	10	
Performance Metrics - Quality Assurance	3	
Proposed Service Goals & Outcomes		Not counted toward max
Budget Summary- Form D		Not counted toward max
Budget Narrative	2	
Total	18	
Model 2: Career Pathways	5	Additional 5 Pages allocated for Model 2

Submittal Requirements For

Service Model 1 Workforce Services provided to general population located at AJC and contracted partnership with Delegate Agencies

And

Service Model 2: Workforce Services provided to general population located at AJC and contracted partnership with Delegate Agencies and Career Pathways Training

1. Proposal Cover Sheet (maximum 1 page which is not counted toward the page maximum)

Please specify which model you are proposing.

2. Qualifications and Experience (maximum 3 pages)

The respondent must provide an overview of its organization and staff, capability and qualifications to successfully carry out the services described herein.

a. Organizational History: Include the organization's mission, vision, governance structure, and legal status.

b. Organizational Capacity: Summarize organizational capabilities and understanding of accounting requirements for contracts involving Federal and State funding. Include your most recent audit report or audited financial statements as an attachment.

c. Organizational Experience: Describe prior work at the organizational level (not the individual staff level) that demonstrates expertise in executing and delivering workforce services. Provide at least three (3) professional references as an attachment with full contact information: Name, title, organizations name, address, email address, and phone number.

d. Prior Performance Outcomes: Demonstrate experience and success delivering the same or similar workforce services as described in this RFP by providing information regarding prior performance outcomes.

e. Staff Overview: Summarize the overall staff and structure of the organization including the number of employees and an organizational chart specific to the proposed service delivery plan as an attachment.

f. Support of Culturally and Linguistically Appropriate Services: Provide a statement supporting how all job seekers will receive services that are culturally and linguistically appropriate (attends to racial, ethnic, religious and language domains) and describe how this will be accomplished.

g. Support of Policies Prohibiting Harassment: Provide a statement supporting how policies are in

place or will be established, supporting ADA/EO/EEO and prohibiting harassment based on race, sexual orientation, gender, gender identity (or expression), religion, and national origin. Describe how this will be accomplished.

h. Trauma Informed Service: Describe how staff will recognize the widespread impact of trauma and the potential paths for recovery, the signs and symptoms of trauma in clients, families, staff and others involved in the system, and how they will respond by fully integrating knowledge about trauma into policies, procedures, and service delivery model that seeks actively to resist re-traumatization.

3. Service Delivery Plan (maximum 10 pages)

Describe how the model you are choosing is an ideal fit for the population to be served.

The proposed Service Delivery Plan should describe how the respondent plans to fulfill all duties of the Service Provider.

a. Summarize how the organization has implemented the model previously and provide details regarding how staff will be oriented, trained and supported to deliver services within the model.

b. Effectiveness: Describe how innovative, evidence-based, and promising practices that are nationally recognized have been incorporated into the service delivery plan. Site evidence for how and why the model is effective and how it is culturally and developmentally appropriate for adults and dislocated workers. Provide citations to support the evidence for effectiveness as an attachment.

c. Implementation:

Describe the importance of each phase/level of service and detail plans to ensure meaningful engagement with job seekers for each of the following:

- Identification/recruitment
- Basic Services
- Individualized Services including assessment and development of Individualized Employment Plans
 - (IEP's)
 - Supportive Services
 - Follow-up Services
 - Include details regarding how job seekers will be assessed using formal standardized tools along with other less formal methods. Describe in detail how assessment tools and methods will be integrated within service delivery.
 - Describe how individualized plans will be developed using a customer driven approach. Detail the basic components for an IEP and describe how Career Planners will provide support and guidance for successful IEP implementation resulting in job readiness and placement.
 - Explain how staff will determine what individual job seekers need and how staff will monitor progress.
 - Provide the organization's definition of job ready candidates. Explain how staff will be organized to manage, deliver and develop the needs of job seekers resulting in job

placements. Explain what methods or practices will be used to increase job placements.

- Demonstrate knowledge and use of relevant Labor Market information and Career Pathways that are most in demand in Milwaukee County, WI.

d. Staff Qualifications and Support

- Describe all key management and staff conducting the proposed services including education and experience requirements for each position including amount of relevant experience serving adult and dislocated workers with unique needs and barriers.
- Detail initial and on-going training and mentorship that staff will receive in order to provide high quality workforce services
- Specify a plan to train staff about career pathways for high demand jobs.
- Include job descriptions and/or profiles for all key staff as proposal attachments.
- Describe how the organization offers family supporting compensation, fringe benefits, career development, and training opportunities

e. Knowledge of Cultural and Socioeconomic Factors: Describe such factors impacting job seekers in Milwaukee County and explain how the proposed approaches for working with job seekers address such factors for outreach, engagement and delivery of services.

f. Job Seeker and Participant Feedback: Describe how ongoing input from job seekers will be gathered, documented and considered for continuous quality improvements to program planning, implementation and evaluation.

g. Coordination with Business Solutions: Describe how the proposed services will be coordinated with EMI's Business Solutions team, specify how job seekers will be assessed, developed for job readiness and referred to the Business Solutions Team in a timely manner.

- Describe the proposed approach to interfacing with the Business Solutions team given the scope of this RFP.
- Describe specific reporting related to the talent pipeline that will be provided to the Business Solutions team to help broker relationships on behalf of the system (i.e. number of job ready candidates for specific careers, number of job seekers in training for specific careers, etc.).

h. Coordinated Services, Partnerships, and Collaborations:

- Explain the organization's experience working with required partners, cross-functional teams and the functional management of staff.
- Explain how the organization will braid that experience into the Milwaukee County public workforce system.
- Identify and describe your relationships with collaborative partners. Describe how your collaborative relationships are developed and maintained.

i. Barriers: Describe potential barriers to success of the proposed plan and how these barriers will proactively be addressed.

j. Continuity of Services: Describe how continuity of services will be maintained for job seekers when there is a change in the operational environment (e.g. staff turnover, changes in leadership, etc.).

k. Delegate Agencies: Identify at least two Delegate Agencies and include the following information:

- Organization Name, Address, City, State, Zip Code, and website address.
 - Principal Contact Person, Title, Phone, Fax, and Email.
 - Principal Fiscal Person, Title, Phone, Fax, and Email.
 - Type of Organization (Non-Profit, For Profit, Government, etc.)
 - Federal Employer Identification Number (FEIN)
 - DUNS Number (if issued one)
 - Annual Budget
 - Annual # Served
 - Geographic area and/or special population served.
- **Location and Capacity:** Describe how the Delegate Agencies are located in and/or have the capacity to serve a preponderance of residents from high poverty areas and/or target population. Cite relevant demographic, performance and/or labor market information.
 - **Workforce expertise:** Describe workforce expertise that the agency brings or leverages.
 - **Recruitment and Outreach Services:** Describe how Delegate Agencies will provide recruitment and outreach services to job seekers
 - **Coordination:** Describe how Delegate Agencies will coordinate with the Adult and Dislocated Worker service provider regarding data entry and case management activities.
 - **Business Services:** Describe how Delegate Agencies will serve business customers and develop employer relationships and job leads for their job seeker population.

4. Performance Metrics – Quality Assurance Plan (maximum 3 pages)

The service provider is required to maintain appropriate documentation and files for reporting and monitoring purposes. All documentation must be collected and entered into required data systems on an on-going basis per DWD and EMI policies and procedures.

a. Data Collection and Management Plan: Describe the plan for data collection and data management within the required data systems by DWD and EMI such as Efforts to Outcomes (ETO) and ASSET.

b. Internal Data Monitoring and Controls: Describe methods used to ensure quality assurance and data integrity via monitoring and internal controls. Specify procedures in place to correct errors in a

timely manner and practices used to limit reoccurring errors.

c. WIOA Performance Measures: Describe how the service delivery model will help ensure that WDA 2 (Employ Milwaukee) can meet and exceed its annual WIOA negotiated performance targets. For your reference, please find below the PY 2019 WIOA Performance Targets.

Common Measure	Goal
Adult Q2 Unsubsidized Employment	68%
Adult Q4 Unsubsidized Employment	63%
Adult Median Earnings	\$4,100
Adult Credential Attainment Rate	60%

Table 1 – Adult Performance Targets PY19

Common Measure	Goal
Dislocated Worker Q2 Unsubsidized Employment	72%
Dislocated Worker Q4 Unsubsidized Employment	71%
Dislocated Worker Median Earnings	\$6,100
Dislocated Worker Credential Attainment Rate	52%

Table 2 – Dislocated Worker Performance Targets PY19

d. Proposed Service Goals and Outcomes: Describe the numbers to be served. (Use Form C which is not counted toward the page limit). Please note the following caveats to the numbers proposed to be served:

- Providers will have to serve participants that were enrolled prior to contract date of July 1, 2020.
- Providers will be asked to exceed all WIOA performance targets by 10%. (*Example:* Provider submits proposal to enroll 100 new adult participants: 78% will need to be placed into unsubsidized employment at Q2 exit. Of those proposed to enter training, 70% will need to attain a WIOA recognized credential.

5. Budget Summary Form (use Form D which is not counted toward the page limit).

6. Budget Narrative (maximum 2 pages)

Provide a Budget Narrative with all requested details as follows:

- Full-Time Equivalent (FTE) Staff:** Clearly identify the number of FTE staff with corresponding position titles that are included in the Service Delivery Plan. The total number of FTE described must equal the number entered on the Budget Summary Form.
- Personnel Salaries:** Clearly describe and provide the formula(s) used to determine the total amount requested for Personnel and Salaries. The total amount must equal the amount entered on the Budget Summary Form.

- c. Fringe Benefits:** Clearly describe and provide the formula(s) used to determine the total amount requested for Fringe Benefits. The total amount must equal the amount entered on the Budget Summary Form.
- d. Travel:** Clearly describe and provide the formula(s) used to determine the total amount requested for Travel. The total amount must equal the amount entered on the Budget Summary Form.
- e. Staff Development:** Clearly describe and provide the formula(s) used to determine the total amount requested for Staff Development. The total amount must equal the amount entered on the Budget Summary Form.
- f. Insurance:** Clearly describe and provide the formula(s) used to determine the total amount requested for Insurance. The total amount must equal the amount entered on the Budget Summary Form.
- g. Audit:** Clearly describe and provide the formula(s) used to determine the total amount requested for Auditing completed during the contract period only. The total amount must equal the amount entered on the Budget Summary Form. Please note, EMI will not reimburse for audits completed before or after the contract period.
- h. Other:** Clearly describe all items included as “other” and provide the formula(s) used to determine the total amount requested. The total amount must equal the amount entered on the Budget Summary Form.
- i. Supplies:** For each type of supply requested, clearly describe and provide the formula(s) used to determine the total amount requested for each type of supply (i.e. telephone/cell phones/hotspots, postage, etc.). The total amount for each supply category must equal the amount entered on the respective cell on the Budget Summary Form.
- j. Administrative/Overhead:** Clearly describe and provide the formula(s) used to determine the total amount requested for Administrative/Overhead. The total amount must equal the amount entered on the Budget Summary Form.
- k. Federal Indirect Approved:** Clearly describe and provide the formula(s) used to determine the total amount requested for Federal Indirect Approved, if applicable. The total amount must equal the amount entered on the Budget Summary Form. Please note, if the organization has a Federal Indirect Approved rate, letter from DOL with rate must be included as an attachment to the proposal.
- l. Non-Direct:** Clearly describe and provide the formula(s) used to determine the total amount requested for Non-Direct. The total amount must equal the amount entered on the Budget Summary Form.

m. FOR-PROFITS ONLY: Profit Amount Expected - clearly describe and provide the formula(s) used to determine the total amount requested. The total amount must equal the amount entered on the

For those applying for Service Model 2, in addition to the Sections 1 – 6 above, additionally provide the following:

Service Model 2: Workforce Services provided to general population located at AJC and contracted partnership with Delegate Agencies and Career Pathways Training;

7. Career Pathways Training (Occupational Training and Bridge Programs) (maximum 5 pages)

The selected Career Pathways Training provider must have strong employer relationships that ultimately lead to career advancement opportunities for job seekers through a program curriculum that offers an industry-recognized credential. Please provide the following information on your proposed Career Pathway Training:

a. Occupational Training:

- **Outreach:** Describe in detail your strategies for outreach, recruitment, enrolling and orienting job seekers to your program. Please identify any unique recruiting timelines. Describe staff experience with engaging jobseekers that are low-skilled. What methods are used to educate jobseekers regarding sector-based career pathway opportunities?
- **Assessment:** Explain how you assess participants' skills and interests to ensure proper enrollment into a Career Pathway Training Program. Include a description of any tools, tests, or methods used to determine the following: levels of basic skills, work readiness skills, interests and aptitude for your specific industry training, occupational skills and supportive service needs.
- **Enrollment/Career Planning:** Describe your process for WIOA enrollment and career coaching/planning with participants. How will you ensure compliance with WIOA requirements? What is your process for developing an IEP? How do you set and manage participant expectations? What is your approach to providing an individualized plan for each participant?
- **Training:** Describe your training program in detail. Explain topics covered and identify how participants will progress throughout the training. Identify the labor market demand for the training program. Describe any employer input and/or participation in any stages of the training program.

Please attach a program syllabus or curriculum. The program syllabus or curriculum should include the number of hours of instruction, specific occupational skills, requirements for entry into the program, and requirements for completion (number of hours, credentials, literacy and numeracy levels, etc.). Please attach any list of prerequisites for program

enrollment that participants receive at orientation.

- **Training Credentials:** Identify key credentials and certifications that the program awards. Is this credential widely recognized by the industry and do your business partners require this credential for employment? If not, why is this credential still beneficial?
- **Training Occupational Skills:** Provide a list of occupational skills that your program instructs and explain how they are relevant to the industry needs. How does the training program keep current with the industry trends and needs regarding skills and relevant credentials?
- **Training Mapping:** Attach a sector-based career pathway map(s) that describes the proposed program. For each step in the pathway (employment, training) include: wages, literacy level, numeracy level and qualifications needed to be successful in that position.
- **Employment Placement Services:**
Employer Relationships. Describe your strategies for pursuing new business relationships and securing job orders. Explain in detail how you plan to place participants into employment and/or advanced training.
Assessing Needs. Describe your process in assessing business needs within an industry sector. Identify any tools, data or surveys used. How does this process inform the program design and curriculum? Give an example of a program modification due to having to align to evolving business needs.
- **Follow-up Services:** Describe your follow-up strategies and how they will enhance job retention and career path growth.

b. Bridge Programs:

- **Recruitment/Placement Expertise:** Describe in detail the organization's expertise in targeting low-skilled individuals and equipping them with the educational skills to transition to post-secondary education or training. For those participants that exit the pathway after the Bridge Program in pursuit of a job, describe your strategy and plan to help those individuals secure entry-level employment.
- **Additional/Advanced Training:** Explain how program graduates are informed of the variety of training programs offered both at community colleges and other occupational training programs. How is your program helping participants make an informed choice and assess the possibility of attending advanced training at a college or other training setting?
- **Funding Sources:** What circumstances justify the use of ITA funded occupational classroom training? How does your program help participants identify and apply for other funding sources (such as Pell Grants or MAP grants) before requesting an Individual Training Account (ITA)?

- **Partnerships and Collaboration:** List any partnerships with community colleges and other training institutions (MOU's with training providers and technical colleges are highly encouraged). Explain any alignment between programs including assessments, curriculum, and program design.

Provide an example of when your organization worked collaboratively with other adult education programs to help transition low-skilled individuals to post-secondary education or training and ultimately to employment. What systems were created to ensure a smooth transition from adult basic education (or English Language Acquisition courses) to workforce development services?

If your Bridge Program receives WIOA Title II funding through the Wisconsin Technical College System (WTCS), describe your past performance and list which National Reporting System (NRS) levels your program offers.

V. Proposal Review and Evaluation Process

Applications will be evaluated by a team of reviewers, which may include WDB members, outside experts and staff. An entity's failure to submit a complete proposal or to respond in whole or in part to RFP requirements may cause EMI to deem the proposal non-responsive and thus ineligible for review.

A. Fiscal Review

EMI will also conduct a fiscal review of all qualified proposals including, budgets, agency audits, leveraged funds and responses to questions related to fiscal operations. EMI reserves the right to review and request further information regarding the respondent's financial situation, if not sufficiently outlined in the submitted materials. EMI reserves the right to assess the risk posed by any recent, current or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event that might affect an organization's ability to operate the requested program.

B. Program Narrative Review

Members of the review team will conduct an in-depth assessment of the program narrative section for each proposal. A scoring instrument will be used based on the evaluation criteria listed in the RFP.

C. Past Performance Review

Through this process, EMI will review a respondent's performance on any previous and/or existing EMI grant agreement(s), as well as check references submitted from other grantors. Achievement of grant agreement outcomes (i.e., number of enrollments, job placements and retention of enrollees), along with compliance with programmatic and fiscal guidelines and timelines will be evaluated.

The review team will perform an in-depth evaluation of all responsive proposals based upon the criteria herein. Prior to its final funding decision, EMI may also: 1) meet with representatives of the responding entity to discuss the proposed program and budget; 2) identify and/or negotiate program or budget changes the responding entity must make as a condition of funding; and 3) identify other documentation the entity must provide as a condition of funding.

After analyzing all of the data submitted, and any additional analysis of the geographic distribution of the programs to ensure community access for Milwaukee County residents as well as coverage of special populations, EMI will select respondents for recommendation to the Program Committee of the WDB and Executive Committee of the WDB for approval. Once approved by the WDB, EMI may award grant subcontractor agreements to successful respondents.

Entities that fail to meet the evaluation criteria specified herein, or proposals that do not meet the service needs will not receive further consideration for funding. Failure to meet evaluation criteria can include, but is not limited to, non-responsive language in the submission, failure to clearly address all areas in the project narrative as required, lack of required documentation, and proposing programs which do not address the specific needs of the population(s) being targeted.

D. Evaluation Criteria

Proposals evaluated with a score below 31 (out of a possible 100 points) will not be considered. Proposals that do not meet minimum standards will be considered non-responsive. EMI reserves the right to contract with any respondent that falls within the acceptable point range. EMI is not required to contract with the entity receiving the highest score as a result of the proposal review process. Factors such as population served and geographic need may carry significant weight.

All proposals will be scored according to the evaluation criteria set forth below and ranked from highest to lowest score. A recommended funding level will be determined based on a number of factors including overall ranking of proposal rating scores, the availability of funds, the number of applications submitted, geographic factors, reasonable unit cost as determined by EMI, the need for the proposed services, and past performance.

E. Criteria Point Value

Table 3: Criteria Point Value	
Qualifications & Experience	15
Service Delivery Plan	55
Performance Metrics – Quality Assurance Plan	10
Realistic and Clear – Proposal Overall	10
Reasonable Costs – Budget Summary and Budget Narrative	10
Total Points Available	100

F. Limitations

EMI shall not pay for any costs incurred by the applicant agencies in the completion of this RFP. Submission of an RFP does not, in any way, obligate EMI to award a contract. EMI reserves the right to accept or reject any applications, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP, if it is in the best interest of EMI to do so. EMI may require successful applicants to participate in contract negotiations prior to contract finalization. EMI shall reserve the right to terminate, with or without cause, any contract entered into as a result of this RFP process.

G. Disclaimers

All contract awards by EMI, pursuant to this RFP, are contingent upon the availability of funds. Respondents are liable for any and all costs incurred prior to final authorization by the WDB and the execution of a contract with EMI.

EMI also reserves the right to:

- Rescind an award and/or reallocate the funding to another applicant should the successful respondent fail to execute its grant agreement in a timely fashion;
- Increase funding levels for any or all delegate agencies selected pursuant to this RFP, if additional funds become available, based on service provider performance, effectiveness and other details;
- Change and amend as necessary its policies or procedures governing the delivery or scope of services described herein;
- Perform an assessment of the risk that any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event might have on an organization's ability to operate a proposed program.

H. Notice of Award

All respondents will be notified by mail as to their award status. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to this effect to EMI's Vice President of Programs and Business Solutions at procurement@employmilwaukee.org.

I. Protest Procedures to Resolve Procurement Disputes

Any applicant desiring to protest a determination concerning this RFP must file a protest with EMI no later than five (5) calendar days following notification of the WDB vote. All protests shall be submitted in writing to procurement@employmilwaukee.org, must specify in detail the grounds of the protest, the facts and evidence in support thereof, and the remedy sought. EMI shall resolve any protest based upon the written protest and any oral and written response thereto provided by EMI staff, in conjunction with the Board's consideration of the application and the review panel recommendation. Resolution of the protest shall be by WDB vote and shall be deemed final.

In the absence of a timely and properly submitted written protest, no party responding to this RFP shall be eligible for any remedy.

J. Disallowed Costs and Cancellations

Successful bidders must accept liability for all aspects of any WIOA program conducted under contract with EMI. Successful bidders will be liable for any disallowed costs or illegal expenditures of funds or program operations conducted. EMI reserves the right to cancel an award immediately if new state or federal regulations or policy makes it necessary to change the program purpose or content substantially, or to prohibit such a program. Bidders must accept liability for all aspects of any WIOA program conducted under contract with EMI.

K. Contracting

The contract award will not be final until EMI and the respondent have executed a mutually satisfactory contractual agreement. EMI reserves the right to make an award without further discussion of the proposal submitted. No program activity may begin prior to the WDB approval of the award and execution of an award letter and/or full contractual agreement between the successful respondent and EMI. Reductions in the funding level of any contract resulting from this solicitation process may be considered during the contract period when a bidder fails to meet expenditure, participant, and/or outcome goals specified in the contract or when anticipated funding is not forthcoming from federal or state governments. EMI reserves the right to determine both the number and the funding levels of contracts finally awarded. Such determination will depend upon overall fund availability and other factors arising during the proposal review process.

L. Cost and Negotiations

EMI reserves the right to reject any or all proposals received and to negotiate with any and all offers on modifications to proposals. Bids submitted which are over the maximum amount of funds specified for this RFP will be rejected. The proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged any other individual for the same services performed by the bidder.

M. Modification of Contracts

Any contract awarded pursuant to this RFP may be unilaterally modified by EMI upon written notice to the contractor under the following circumstances:

- a) Contractor fails to meet performance and service expectations set forth in the contract, or
- b) The federal or state government increases, reduces or withdraws funds allocated to EMI, which impact services solicited under this RFP, or
- c) There is a change in federal or state legislation and/or their regulations, local laws, or applicable policies and procedures.

N. Insurance Levels

EMI expects that the selected provider will secure and keep in force during the term of the agreement, the following insurance coverages, covering provider for any and all claims of any nature which may in any manner arise out of or result from the provider's performance under this agreement. The provider shall, at its sole cost and expense, provide:

- Commercial General Liability Insurance policy providing coverage against claims for personal

injury, death or property damage occurring in connection with the Project. The limits of such insurance shall not be less than \$1,000,000 combined single limit per occurrence, \$2,000,000 aggregate;

- Worker's Compensation coverage consistent with the laws of the State of Wisconsin;
- Commercial Automobile Liability Insurance, including Non-Owned and Hired Auto Liability with a limit of not less than \$1,000,000;
- Commercial Umbrella Liability coverage of at least \$2,000,000;
- A Network Privacy and Security Policy (also known as cyber liability) providing coverage with a minimum limit of \$2,000,000.

VI. Glossary and Definitions

Applicant: means any individual who applies to Employ Milwaukee or its subcontractors for available workforce services. For specifically funded programs, applicant remains an applicant until the provisions for "customer" have been met.

Assessment: The process by which applicants are interviewed to determine their employability, motivation, aptitude, family situation, education and training, attitudes, transportation, support needs, abilities and interests in order to assist in developing an Individual Employment Plan for the attainment of the individual's career goals. Testing and counseling are a part of the assessment process.

Basic Skills Deficient: The label given an individual who computes or solves problems, reads, writes, or speaks English at or below the **eighth-grade level** or is unable to speak English at a level necessary to function on the job or in society.

Basic Skills Goal: A measurable increase in basic education skills including reading comprehension, math computation, writing, speaking, listening, problem solving, reasoning, and the capacity to use these skills.

Case Management/Career Coaching: The provision of a participant-centered approach in the delivery of services, which are designed to ensure and coordinate individual employment plans, including service strategies for job-seekers to ensure access to necessary Workforce Innovation and Opportunity Act funded activities and supportive services, using, where feasible, computer-based technologies; and to provide job and career counseling during program participation and after job placement.

Common Measures: Performance measures for all job seekers served through the workforce system including: Staff Guided Entered Employment; At Risk Employment Retention; Total Job Seekers Educational Achievement; Placement in Employment, Education, or Training; Retention in Employment, Education, or Training; Earnings after entry into unsubsidized employment; Credential Rate; and In-Program Skills Gain.

Contractor: refers to an entity, which receives financial assistance from Employ Milwaukee for the purpose of administering Board programs, projects, or parts thereof. A contract establishes a legal obligation to perform the services specified for agreed upon costs.

Cost Principles: refers to fact that all costs reimbursed via WIOA funds must be reasonable, necessary, allowable and allocable. These principles are defined as follows:

- **Reasonable/necessary cost:** A cost is reasonable if, in its nature or amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost. Consideration shall be given to: (a) whether the cost is a type generally recognized as ordinary and necessary for the operation of the organization or the performance of the award; (b) the restraints or requirements imposed by such factors as generally accepted sound business practices, arm's length bargaining, Federal and State laws and regulations, and terms and conditions of the award; (c) whether the individuals concerned act with prudence, considering their responsibilities to their organization, employees, customers, the public at large, and the Government; (d) whether costs are consistent with established practices of the organization and do not unjustifiably increase the costs. Reasonableness of costs may be established by comparison with other proposals (best price – same product), historical data, comparison with prior in-house costs, and/or comparison with similar labor market costs.
- **Allowable cost:** "To be allowable, a cost must be necessary and reasonable for proper and efficient administration of the program, be allocable thereto under these principles, and except as provided herein, not be a general expense required to carry out the general (i.e. non-Board funded) business of the sub-recipient. Costs charged to the program shall be consistent with those normally allowed in like circumstances in non-federally sponsored activities and with applicable state and local law, rules, and regulations..."

Credential: An industry or state recognized degree, certificate or credential. These include, but are not limited to: high school diploma, GED, or other recognized equivalents, postsecondary degrees/certificates, recognized skill standards, and licensure or industry-recognized certificates designed to equip individuals to enter or re-enter employment, retain employment, or advance into better employment. (TEGL 17-05)

Customer: an Employer or Job Seeker that has requested assistance, or determined to be eligible for a Board sponsored program. Job Seeker customers in specifically funded programs may have to be verified as being certified eligible to continue to receive services e.g. (Case Management, Training etc.)

Customized Training: Training that is designed to meet the special requirements of an employer (including a group of employers) that is conducted with a commitment by the employer to hire an individual upon successful completion of the training and for which the employer pays a significant portion of the cost of the training.

Date of Exit: Represents the last day on which the individual received a service funded by the program or a partner program (see definition of “exit”).

Date of Participation: Represents the first day, following a determination of eligibility (if required), that the individual begins receiving a service funded by the program (see definition of participant).

Diploma: The term diploma means any credential that the state education agency accepts as equivalent to a high school diploma. The term diploma also includes post-secondary degrees including Associate (AA and AS) and Bachelor Degrees (BA and BS).

Dislocated worker: means an individual as referenced under WIOA.

Economically Disadvantaged: An individual who received an income, or is a member of a family that received a total family income that, in relation to family size, does not exceed the higher of the poverty line, or 70 percent of the Lower Living Standard Income Level (LLSIL).

Educational Gain: At post-test, participant completes or advances one or more educational functioning levels from the starting level measured on entry into the program (pre-test).

Efforts to Outcomes (ETO): EMI’s integrated workforce data system that will be used to record and track all job seeker information including eligibility information, service plans and employer services including posting and filling job orders.

Eligible (Eligibility): Refers to an individual’s ability to receive services under the Workforce Innovation and Opportunity Act and required documentation.

Employed At Date Of Participation: An individual employed at the date of participation is one who:

- Did any work at all as a paid employee on the date participation occurs
- (except the individual is not considered employed if: a) he/she has received a notice of termination of employment or the employer has issued a Worker Adjustment and Retraining Notification (WARN) or other notice that the facility or enterprise will close, or b) he/she is a transitioning service member;
- Did any work at all in his/her own business, profession or farm;
- Worked 15 hours or more as an unpaid worker in an enterprise operated by a member of the family; or
- Was not working, but has a job or business from which he/she was temporarily absent because of illness, bad weather, vacation, labor-management dispute, or personal reasons, regardless of whether paid by the employer for time off, and regardless of whether seeking another job.

Enrollment: Refers to the completed process by which an eligible participant has been referred for WIOA services and for whom required documents have been completed and entered into ETO or the State’s tracking system (ASSET).

Employers: refers to all establishments of any size, organized as sole proprietorships, partnerships or corporations engaged in legal commerce who hire employees for money wages under conditions conforming to State and Federal labor laws.

Employment: as defined in DWD and Employ Milwaukee policies means full-time (no less than 30 hours per week) work in the job trained for, or in a training-related occupation, at or above wages, which meet Employ Milwaukee standards; preferably benefits are included, with exception of summer work experience.

Grant: means funds awarded from a specific funding source by the State Department of Workforce Development, an agency of the State of Wisconsin.

Historically Underutilized Business (HUB): is a business at least fifty percent owned and operated by minority group members, as defined by State law. Federal regulations define Disadvantaged Business Enterprises (DBE) and Minority or Woman Owned Business enterprises (MWBE) as a publicly traded or privately owned business, at least fifty-one percent of which is owned by minority group members determined to be disadvantaged. Minority members include Blacks, Puerto-Ricans, Spanish-speaking Americans, American Indians, Eskimos, and Aleuts, Asian Pacific Americans, and Asian Indians. Female owners or female owned businesses are also considered to qualify as minority business enterprises. Such businesses will be offered maximum opportunities to compete for Employ Milwaukee contracts.

Individual Employment Plan (IEP): A plan developed for a job seeker identifying the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services required for the participant to achieve the employment goals.

Incumbent Worker Training: Training designed to meet the special requirements of an employer (or group of employers) for a skilled workforce or to avert the need to lay off employees by assisting the workers in obtaining the skills necessary to retain employment. Training is conducted with a commitment by the employer to retain or avert the layoff of the incumbent worker.

Job Center of Wisconsin: www.jobcenterofwisconsin.org is a website developed and maintained by the Wisconsin Department of Workforce Development. The Job Center of Wisconsin is a resource that provides links and tools that the regional business community can use to post position vacancies and access a database of resumes, which have been submitted by job seekers.

Job Retention: The period an individual remains in an unsubsidized job following placement. The period of required retention is determined in accordance with WIOA, or as dictated by the funder.

Job Search Assistance: Training, which provides the participant with the instruction and necessary skills to obtain full time employment. These skills may include resume writing, interviewing skills, telephone techniques and networking. Job search assistance must be offered to all participants and may be delivered individually or in group settings.

Job Development: The planned and organized effort by agency representatives to encourage employers or business organizations to make jobs available for WIOA participants.

On-the-Job Training (OJT): Training by an employer that is provided to a paid participant while engaged in productive work in a job that provides knowledge or skills essential to the full and adequate performance of job and provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and the additional supervision related to the training. OJT is limited in duration as appropriate to the occupation for which the participant is being trained.

Participant: means an individual who: is determined eligible to participate in Employ Milwaukee funded Program; and receives a service funded by the program in either a physical location (one-stop career center of affiliate site) or remotely through electronic technologies.

Personal Responsibility And Work Opportunity Reconciliation Act of 1996: is the act which initiated major reforms in welfare (also called Welfare Reform) by replacing the former Aid for Dependent Children (AFDC) and Job Opportunities and Basic Skills (JOBS) programs, and amending JTPA, the Supplemental Security Income (SSI) program, Child Protection and Child Care laws, and the Food Stamp program to facilitate moving welfare customers into paid employment.

Program Income: means income received by Contractor directly generated by a grant or sub grant supported activity, or earned only as a result of the grant or sub grant (Reference: 20 CFR, 627.450). Such earnings include, but may not be limited to, income from fees for services, rental of property, or sale of commodities; interest earned on advances; and in the case of public or private non-profit agencies, revenues earned from a contract in excess of actual costs incurred in providing the contracted services. Regulations permit fee-for-service arrangements; however, any resulting income must be tracked and accounted for separately from other program funds. Program Income earned under Employ Milwaukee funded programs must be reported to Employ Milwaukee, and must be used only for Employ Milwaukee purposes and for the program in which it was earned.

Proposer/Respondent denotes the interested party, the audience for this RFP document, and the probable respondent to the solicitation.

Proposers' Conference is a conference scheduled in conjunction with the RFP process to offer technical assistance to explain or clarify the RFP document and to answer questions. This conference is the only opportunity afforded potential respondents/respondents to obtain guidance on the scope and nature of the work required or asks other technical questions concerning a solicitation. All questions on such matters will be asked and answered in written form. Attendance at the Proposers' Conference is not mandatory, but is strongly encouraged. NOTE: All Employ Milwaukee Board members, officers, and staff are precluded from entertaining questions concerning a proposal or the procurement process outside the confines of the Respondents' Conference. Potential respondents are asked to respect these conditions by not making personal requests for assistance, except at the Proposers' Conference.

Qualified Registered Apprenticeship: A program approved and recorded by the U.S. Department of Labor Employment and the Wisconsin Bureau of Apprenticeship Standards.

Rapid Response: provides early intervention assistance designed to transition workers to their next employment as soon as possible.

Registered Participant: A person, who has been certified eligible, recorded in ASSET and has been provided at least one Career Service.

Regs or Regulations: means those rules, regulations, and their amendments, promulgated by the United States Department of Labor (DOL), Health and Human Services Commission (HHSC), U.S Department of Agriculture (USDA) and/or the Wisconsin State Department of Workforce Development and other specific funding sources made available to Employ Milwaukee through DWD.

Sarbanes-Oxley Act (SOX): This 2002 Act contains significant protections for corporate whistleblowers.

School Drop Out: In WIOA, the term “school dropout” means an individual who is no longer attending any school and who has not received a secondary school diploma or its recognized equivalent.

State: means the Wisconsin State Department of Workforce Development and/or the Governor of the State of Wisconsin.

Supplemental Nutritional Assistance Program (SNAP): is a program to assist food stamp recipients to enter employment and training activities which promote long-term self-sufficiency, authorized under the Food Stamp Act of 1997, as amended by the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (also called the Welfare Reform).

Supportive Services: Services such as transportation, childcare, dependent care, housing, and needs-related payments that are necessary to enable an individual to participate in activities authorized under WIOA.

Temporary Assistance To Needy Families (TANF): a program provided through the Department of Children and Families Department to persons meeting certain residency, income and resource criteria as provided for under the Personal Responsibility and Work Opportunity Reconciliation Act and the Temporary Assistance for Needy Families block grant.

Termination means (a) any cessation of a contract with Employ Milwaukee; and (b) for customers in WIOA or other specifically funded programs, termination means official completion from all Contractor program activities and services with no further services to be provided.

Wisconsin State Department of Workforce Development (WI DWD) is the state agency that operates an integrated workforce development system through the consolidation of job training, employment and employment related education programs

Work Readiness: means measurable increase in work readiness skills including world-of-work awareness, labor market knowledge, occupational information, values, clarification, and personal understanding, career planning and decision making, and job search techniques (resumes, interviews, applications, and follow-up letters.) They also encompass survival/daily living skills such as using the phone, telling time, shopping, renting an apartment, opening a bank account, and using public transportation. They also include positive work habits, attitudes, and behaviors such as punctuality, regular attendance, presenting a neat appearance, getting along and working well with others, exhibiting good conduct, following instructions and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability, and assuming the responsibilities involved in maintaining a job. This category also entails developing motivation and adaptability, obtaining effective coping and problem solving skills, and acquiring an improved self-image. Please note: this term applies to the current WIOA statutory youth measures only; it does not apply to the common measures.

Workforce Innovation Opportunity Act (WIOA): signed into law on July 22, 2014. WIOA is landmark legislation designed to strengthen and improve our nation's public workforce system and help put Americans, especially youth and those with significant barriers to employment, back to work. WIOA supports innovative strategies to keep pace with changing economic conditions and seeks to improve coordination between the core WIOA and other Federal programs that support employment services, workforce development, adult education and literacy, and vocational rehabilitation activities. Complete Act may be found at: www.doleta.gov.

ATTACHMENT A

ADMINISTRATIVE REQUIREMENT/EXPECTATIONS

This section is a listing of General Administrative Requirements that will be required to be adhered to throughout the term of the grant. Employ Milwaukee is largely funded by federal dollars through the Department of Labor and therefore follows the *Uniform Administrative Requirements, Cost Principles, and Audit Requirements: 2 CFR Part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements; Final Rule; 2 CFR Part 2900: DOL Exceptions to 2 CFR Part 200; 48 CFR Part 31; and with additional restrictions imposed based on the individual grant source. Respondents unable to meet these standard requirements will not qualify.*

Proposals must contain a response to this Administrative Requirements section by completing all required Administrative Forms. Failure to respond to a requirement may be cause for rejection of the Respondent's proposal.

- **Proposers** must submit the following documentation:
 - 1) Annual Balance Sheet and a Profit/Loss Statement
 - 2) Copy of Annual Audit Report
 - 3) W-9
 - 4) Current Certificate of Liability
 - 5) Budget Narrative (Form D)
 - 6) Subgrantee Internal Control Questionnaire
 - 7) Subrecipient Contacts (Form A, Page 1 and 2)

Additional administrative requirements are as follows.

- **Adhere to Policies:** At any time, the US Department of Labor or the State of Wisconsin Department of Workforce Development may issue Training and Employment Guidance Letters (TEGL) or other policy. Additionally, Employ Milwaukee may change policies in its plan at any time. These policies may or may not result in changes to fiscal or operational procedures but must be followed. Employ Milwaukee will receive and disseminate all policies directly to the service provider.
- **File Maintenance/ Record Keeping:** Files must be maintained for each participant in manner consistent with federal, state and local regulations and procedures, and with the WDB File Retention Policy found in the WIOA Plan.
- **Confidentiality and Security:** The Grantor and the sub-recipient will both engage in measures to protect the confidentiality and to protect against unauthorized access or disclosure of workforce information (including, but not limited to):
 - 1) Limit paper documentation (reports, screen prints, etc.) containing workforce information of a confidential or personal identifiable nature.
 - 2) Store paper information in a place physically secure from access by unauthorized persons.
 - 3) Store and process the data in an electronic format in a way that is secure from access by unauthorized persons.
 - 4) Take precautions to ensure that only authorized personnel have access to the computer systems in which the data is stored.
 - 5) Make the data accessible only to staff who require it in the official performance of their job duties; all data will be kept in the strictest confidence.

- **Source Documents:** The sub-recipient is responsible to comply with regulations which include the collection and storage of customer source documents and have written policies in place for instruction regarding these requirements within its own organization. All customer source documentation shall be kept in an orderly fashion in the customer file.
- **Records Retention:** Participant files shall be maintained for seven (7) years after the last date of service including follow-up. This requirement also pertains to respondents that have been determined eligible but not served and to respondents determined ineligible, refused certification or otherwise not served. All records pertinent to complaints/grievances/appeals and resolutions must also be retained for seven (7) years.

In addition; the selected sub recipient shall ensure compliance with all the established requirements in the Code of Federal Regulations (CFR); 2CRF200, and

- **Provide Employ Milwaukee personnel access to:**
 - Accounting systems, electronic spreadsheets, general ledger, balance sheets, income and expense reports and all other financial activity reports of the sub recipient.
 - All financial policies and procedures, including billing and collection policies and purchasing and procurement policies
 - Accounts payable systems and policies
- **Ensure adequacy of agency fiscal systems to generate needed budgets and expenditure reports, including:**
 - Accounting policies and procedures
 - Budgets
 - Accounting system and reports
 - Submit a line-item budget with sufficient detail to permit review and assessment of proposed use of funds for the management and delivery of the proposed services
 - Document all requests for and approvals of budget revisions
 - Establish policies and procedures to ensure compliance with sub grant provisions
 - Document and report on compliance as specified by the grantee
 - Develop and maintain a current, complete, and accurate asset inventory list and a depreciation schedule that lists purchases of equipment by funding source
 - Make the list and schedule available to the grantee upon request
 - Ensure that budgets and expenses conform to federal cost principles
 - Ensure fiscal staff familiarity with applicable federal regulations and GAAP
 - Make available to the grantee very detailed information on the allocation and costing of expenses for services provided
 - Have in place policies and procedures to determine allowable and reasonable costs
 - Have in place reasonable methodologies for allocating costs among different funding sources and Employ Milwaukee categories
 - Make available policies, procedures, and calculations to the grantee on request
 - Have in place systems that can provide expenses and client utilization data in sufficient detail to determine reasonableness of unit costs
 - Maintain payroll records for specified employees

- Establish and consistently use allocation methodology for employee expenditures where employees are engaged in activities supported by several funding sources.
 - Make payroll records and allocation methodology available to grantee upon request.
- **Transparency** – Employ Milwaukee operates under open meeting laws. The selected proposer must be aware of and adhere to open records for all program matters and open meetings where the program is being discussed. Employ Milwaukee considers all records and program plans funded with federal dollars as open records which must be made available to anyone requesting such information.
 - **Data and Customer Tracking Systems**
ASSET is the current web-based, state-managed database system that supports workforce systems in Wisconsin. ETO is the current web-based, Employ Milwaukee-managed database that supports workforce systems in Milwaukee County. The successful applicant will be required to use ASSET and ETO to record and track all participant activities, including services rendered and outcomes achieved.
 - **Accessibility and Equal Opportunity**
Employ Milwaukee is committed to equal access for all customers to all services. All proposers must ensure equal opportunity to all individuals. No individual shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any federally funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, sexual orientation, political affiliation or belief. All proposers are expected to demonstrate full compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws. This involves ensuring that staff receives accessibility training, and may involve developing accessibility plans. All respondents must ensure all written materials and communications include the statement: “Reasonable accommodations and auxiliary equipment

Employ Milwaukee Expectations

- Proposer who can provide additional hours of services, including evening and weekends.
- **Community Collaboration**
Employ Milwaukee promotes collaboration and non-duplication of services in the community. The selected WIOA contractors are expected to work with providers of other workforce development and economic development agencies in the area to ensure that WIOA Title 1 Adult and Dislocated Worker Services are not duplicative of those offered in the county.
- **Innovation and Evidenced Based Practices**
Innovation occurs when evidence-based practices are enhanced or applied in a new way. The selected contractor (s) is expected to provide services that are innovative and evidenced-informed and to back-up the model with data that demonstrate such.

ATTACHMENT B

PROPOSAL CHECKLIST

	Included/Done
RFP FORMAT	
Document meets required format.	
Table of Contents is included	
Document follows outlined sections and each section is clearly labeled; Page numbers are included.	
Document meets required page limit.	
Correct numbers of copies are included in packet with searchable PDF on a jump drive	

PROPOSAL NARRATIVE	
1. Proposal Cover Letter – Form A	
2. Qualifications & Experience	
3. Service Delivery Plan	
4. Performance Metrics - Quality Assurance - Form C	
5. Budget Summary Form – Form D	
6. Budget Narrative	
7. If applicable, Model 2 Career Pathways	

FORMS	
Form A – Cover – Agency Identification Form (Referenced above).	
Form B – Certificate of Respondents Assurances	
Form C – Proposed Service Goals & Outcome (Referenced above).	
Form D – Budget Summary Form (Referenced above)	
ATTACHMENTS	
Certification of Regarding Debarment	
Certification Regarding Drug Free Workplace	
Certification Regarding Lobbying	
Certification Regarding Conflict of Interest	
Certification of Affirmative Action Plan	
Subgrantee Internal Control Questionnaire	
Proof of Incorporation Status or Agency Status	
Proof of Bonding (if applicable) and Certificates of Insurances	
Organizational Chart	
Job Descriptions and Resumes	
Copy of most recent audit report	
W-9	
Copy of last two years of workforce program monitoring reports	
List of References	



FORM A. - COVER

Agency Identification Form

PROPOSER AGENCY INFORMATION:

IDENTIFY WHICH MODEL IS PROPOSED:

Agency Name	Contract Period July 1, 2020 – June 30, 2021												
Agency Address	FEIN: Agency Fiscal Year <input type="checkbox"/> Calendar <input type="checkbox"/> Other (If Other) _____ to												
Agency Type (Check all that Apply) <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Government</td> <td><input type="checkbox"/> Tribe</td> </tr> <tr> <td><input type="checkbox"/> Private, For Profit</td> <td><input type="checkbox"/> Consortium – Specify Lead Agency and type)</td> </tr> <tr> <td><input type="checkbox"/> Private, Not for Profit</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Corporation</td> <td></td> </tr> <tr> <td><input type="checkbox"/> County</td> <td><input type="checkbox"/> Other (Specify)</td> </tr> <tr> <td colspan="2" style="text-align: center;">.</td> </tr> </table>		<input type="checkbox"/> Government	<input type="checkbox"/> Tribe	<input type="checkbox"/> Private, For Profit	<input type="checkbox"/> Consortium – Specify Lead Agency and type)	<input type="checkbox"/> Private, Not for Profit		<input type="checkbox"/> Corporation		<input type="checkbox"/> County	<input type="checkbox"/> Other (Specify)	.	
<input type="checkbox"/> Government	<input type="checkbox"/> Tribe												
<input type="checkbox"/> Private, For Profit	<input type="checkbox"/> Consortium – Specify Lead Agency and type)												
<input type="checkbox"/> Private, Not for Profit													
<input type="checkbox"/> Corporation													
<input type="checkbox"/> County	<input type="checkbox"/> Other (Specify)												
.													

CONTINUED ON NEXT PAGE

FORM A – CONTINUED - PROPOSER AGENCY PERSONNEL

Executive Director's Name	Title	Telephone Number
Mailing Address		Fax Number
		Email Address
Person Responsible for Day to Day Operations	Title	Telephone Number
Mailing Address		Fax Number
		Email Address
Chief Financial Officer	Title	Telephone Number
Mailing Address		Fax Number
		Email Address
Person Responsible for Equal Rights/Civil Rights Compliance, Limited English Proficiency	Title	Telephone Number
Mailing Address		Fax Number
		Email Address
RFP Direct Contact	Title	Telephone Number
Mailing Address		Fax Number
		Email Address

FORM B. – CERTIFICATIONS OF RESPONDENTS ASSURANCES

I recognize that I must give assurance for each item below. If I cannot, this proposal will be automatically rejected. The assurances are:

1. I am authorized by my Board of Directors, Trustees, other legally qualified officer, or as the owner of this agency or business to submit this proposal.
2. My organization is not currently on any federal, State of Wisconsin, or local debarment List.
3. My organization will provide records to show that we are fiscally solvent and will provide any other information and/or accept and appointment for interview, if needed.
4. We have, or will have, all of the fiscal control and accounting procedures needed to ensure that WIOA funds will be used as required by law and contract.
5. I have read Section V Assurances & Certifications and our organization is prepared to sign a contract with these requirements.

We will meet all applicable Federal, State, and local compliance requirements. These include, but are not limited to:

- Maintaining records that accurately reflect actual performance.
- Maintaining record confidentiality, as required.
- Reporting financial, participant, and performance data, as required.
- Complying with Federal and State non-discrimination provisions.
- Meeting requirements of Section 504 of the *Rehabilitation Act of 1973*.
- Meeting all applicable labor law, including Child Labor Law standards.
- Adhering to the Employ Milwaukee marketing guidelines and committing to using the required funding statements on all materials, including those for outreach.
- Accepting funding for and working within the guidelines of other funding opportunities provided by Employ Milwaukee.

We will not:

- Place a WIOA participant in a position that will displace a current employee.
- Use WIOA money to assist, promote, or deter union organizing.
- Use funds to employ or train of persons in sectarian activities.
- Use WIOA funds in the construction, operation, or maintenance of any part of a facility to be used for sectarian instruction or religious worship.
- Use WIOA funds for lobbying.

I hereby assure that all of the above are true.

Name	Title	Date
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Form C. - Proposed Service Goals and Outcomes

Please access this form in a Microsoft Excel document posted on the Employ Milwaukee website.

Adult Program Goals:	Description	Goal	% of Enrolled
New Enrollments	# of participants who enroll during contract term		100%
Training & Education Enrollments	# of participants who enroll into a training and/or educational service Individual Training Accounts: Career Pathways Training:		
Training & Education Completions	# of participants who complete a training and/or educational service Individual Training Accounts: Career Pathways Training:		
Credentials Earned	# of participants who earn a credential Individual Training Accounts: Career Pathways Training:		
Placements	# of participants placed into unsubsidized employment		

* All Goals above are unduplicated counts

Dislocated Program Goals	Description	Goal	% of Enrolled
New Enrollments	# of participants who enroll during contract term		100%
Training & Education Enrollments	# of participants who enroll into a training and/or educational service Individual Training Accounts: Career Pathways Training:		
Training & Education Completions	# of participants who complete a training and/or educational service Individual Training Accounts: Career Pathways Training:		
Credentials Earned	# of participants who earn a credential Individual Training Accounts: Career Pathways Training:		
Placements	# of participants placed into unsubsidized employment		

* All Goals above are unduplicated counts

FORM D – Budget Summary

Please access this form in a Microsoft Excel document posted on the Employ Milwaukee website.

Budget Summary			
Organization Name:		Contract Number:	
Fiscal Contact Person:		Contract Period:	
Mailing Address:			
Fiscal Contact Phone:			
Fiscal Contact Fax:			
Fiscal Contact E-Mail: _____			
Subrecipient is aware of the requirement that these funds may not be used to supplant other federal, state, or local funds (specifically TANF, WIOA, FSET & Other Programs) and that funds received by the subrecipient through this grant will be used only for the purposes stated.			
COST CATEGORY	CALCULATION	DESCRIPTION	BUDGET
Personnel	Detail on Schedule A	Detail on Schedule A	\$ -
Fringe Benefits	% of Wages	Example : Includes Health, Dental, Life, Unemployment, Workers Comp and Retirement Benefits	\$ -
Travel	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: # of direct staff to ____ conference, travel costs to local centers for training, etc.	\$ -
Staff Training	Estimated Costs - Requires breakdown (how are estimated costs determined?)	List types of training, # of staff, etc.	\$ -
Supplies	Estimated Costs - Requires breakdown (how are estimated costs determined?)	List types of supplies, purpose, etc.	\$ -
Support Services - Transportation	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: Bus Tickets & Van Service, etc.	\$ -
Support Services - Other	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: Childcare, exam fees, uniforms,	\$ -
OTHER			
Occupancy	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: Rent, Depreciation, etc.	\$ -
Utilities	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: Telephone, Electric, etc.	
Individual Training Account	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: 40 ITAs at average cost of \$3,500	
Career Pathway Training	Estimated Costs - Requires breakdown (how are estimated costs determined?)	Example: 30 Participants in Career Pathways training at average cost of \$3,500	
Total Direct Charges			\$ -
Indirect Charges (Fiscal & Administration)	Indirect Cost Calculation (De Minimis, Indirect Cost Rate, CAP, or Negotiated)	Example: Costs will be allocated based upon organizations cost allocation policy. Includes Fiscal, Human Resources, Information Technology and CEO offices	\$ -
TOTAL BUDGET			\$ -

FORM D – Staff Wage Detail

Staff Wage Detail

Organization Name:

Contract Number:

Contract Number:		Total Monthly Wage	Percentage Applied to Contract	Months Applied to Contract	Total Charged to Contract
Staff Name	Job Title				
			100.00%		\$ -
			100.00%		\$ -
			100.00%		\$ -
			100.00%		\$ -
			100.00%		\$ -
			100.00%		\$ -
			100.00%		\$ -
			25.00%		\$ -
			100.00%		\$ -
					\$ -
PROGRAM TOTALS					\$ -
ADMINISTRATIVE STAFF					
ADMINISTRATIVE TOTALS					
TOTALS		\$ -			\$ -