

REQUEST FOR PROPOSALS



**Program Year 2018
WIOA Youth Services
for the following counties:**

La Crosse, Monroe, Buffalo, Trempealeau, Juneau, Jackson, Crawford, Vernon

Issued By	Western Wisconsin Workforce Development Board, Inc. (Western WDB)
Grant Period	July 1, 2018 to June 30, 2019 with an option to renew for a one-year period based on satisfactory evaluation.
Estimated Funding	\$325,000 <u>estimated</u> total for cost reimbursement contract to provide the following services: WIOA Youth (minimum of 75% Out of School)
Funding Source	US Department of Labor, Wisconsin Department of Workforce Development and the Western Wisconsin Workforce Development Board, Inc. Workforce Innovation and Opportunity Act
Submission Requirement	One (1) Original and four (4) hard copies; One (1) copy on USB device. Received in mail or in person – no electronic submissions. Due by 4:00 p.m. May 14, 2018
Direct all questions and submit proposals to:	Julie Mitchell, Executive Director Western Wisconsin Workforce Development Board, Inc. 2615 East Avenue South, Suite 101 La Crosse, WI 54601 Phone: 608-789-5499 Email: mitchellj@westernwdb.org

Publication: This RFP is made available to prospective applicants through publication on the Western WDB website (www.westernwdb.org) on or about April 13, 2018 and through email to all current contractors and those who have requested that they be included on the list for proposals.

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I. OVERVIEW

In an effort to promote equal access to Workforce Innovation and Opportunity Act funding and active participation among providers in our region, the Western Wisconsin Workforce Development Board, Inc. (Western WDB) is releasing a Request for Proposal (RFP) for the purpose of procuring an entity to provide Title 1 Youth services. **Provision of these services must be offered in cooperation with the Comprehensive Job Centers (One-Stop Centers) located in La Crosse and Monroe Counties and made available in the eight-county area in a manner consistent with the data provided in this solicitation.**

The Western WDB encourages innovative service delivery proposals that meet the purpose of this RFP and are characterized by collaboration, integration, accountability, continuous improvement and results. Through these services, the Western WDB expects to achieve a measurable and positive impact on the success of employers and workers, and therefore the economic development and standard of living of the region.

This RFP is not in itself an offer for work, nor does it commit the Western Wisconsin Workforce Development Board, Inc. to fund any proposals submitted, nor be held liable for costs associated with the preparation or research of proposals. The Western WDB reserves the right to fund providers that serve the best interest of the Western WDB based on the evaluation criteria.

The services specified in this RFP requires substantive knowledge and understanding of:

- The Workforce Innovation and Opportunity Act (WIOA) and regulations
<http://www.doleta.gov/wioa>.
- State of Wisconsin, Department of Workforce Development's WIOA Plan, Policies and Procedures
<http://www.dwd.wisconsin.gov>
- Western Wisconsin Workforce Development Board, Inc. WIOA Plan and policies
<http://www.westernwdb.org>
- Uniform Guidance - <http://www.ecfr.gov/cgi-bin/text-idx?node=2:1.1.2.2.1&rgn=div5>
- The employer base in the western Wisconsin Region, including labor market information and demographics

II. PROPOSAL SOLICITATION PROCESS AND TERMS

A. Proposal Due Date

All proposals must be received by 4:00 pm on May 14, 2018. Proposals must be hand-delivered or mailed through US Postal Service to:

Julie Mitchell, Executive Director
Western Wisconsin Workforce Development Board, Inc.
2615 East Avenue South, Suite 101
La Crosse, WI 54601

Proposers must consider adequate time needed for delivery by the due date and time. It is the responsibility of the proposer to ensure that the proposal package is delivered appropriately by the due date and time. The mail will be checked at 4:00 p.m. on the due date. Any proposal not in the box at that time or hand-delivered by that time will be considered non-responsive and will

not be evaluated. No late proposals will be accepted. Faxed or emailed proposals will not be accepted, no exceptions.

B. Contract Period and Type

This selected contractor will begin on July 1, 2018. The initial contract will be for a twelve (12) month period, July 1, 2018 to June 30, 2019, with an option to renew for one (1) additional year, based on satisfactory evaluation which includes meeting performance measures and other contract milestones. The Western WDB reserves the option to modify contracts on a year-to-year basis in response to labor market information and/or business intelligence.

Contracts will be cost reimbursement. Final contracts will also be subject to any changes in the legislation, regulations or policies initiated by the funding sources and funding availability. The Western WDB reserves the right to vary or change the terms of any contract executed as the result of this RFP including funding levels, the scope of work, goal, performance standards as it deems necessary in the interest of the Western WDB and its programs. Renewals will depend on future funding availability, contractors' satisfactory performance, and other factors such as federal legislative changes.

C. Estimated Allocations

The funding levels indicated in this solicitation are **estimates only**, based on current allocations and the WIOA Plan. Actual funding amounts will depend on actual allocation and budgets may need to be adjusted. **PLEASE NOTE: Youth service providers are required to spend 20% of allocations on participant work experience. The contract executed as a result of this RFP does not reflect the actual allocations; the contract is determined by the WDB. The selected contractor will be required to work closely with the WDB to determine the actual percentage of the contract that needs to be spent on work experience to meet the 20% requirement. Depending on the previous year's expenditures, the selected contractor may be required to spend as much as 30% of this contract on work experience.**

D. Eligible Applicants

Proposals will be accepted from any private for-profit agency, private non-profit organization, government agency, faith or community based organization or educational institution that can demonstrate the capacity to successfully provide the services identified in this RFP. Proposals from consortia, partnerships or other combinations of organizations are allowed but must identify one organization as the lead agency and prime contractor and must specify the assignment of subcontracting relationships.

E. Schedule for RFP Submission, Review and Awards

The Western WDB reserves the right to make changes to the timeline due to unforeseen events.

RFP Release **By April 13, 2018**
Proposals will be available on the Western WDB website at www.westernwdb.org

Bidder's Conference.....**April 26, 2018 @ 11:00 am CST**

Call-in attendance is available upon request. Questions that arise during this conference will be answered and posted on the Western WDB website on May 4, 2018.

Proposer’s Questions to Western WDB..... May 1, 2018 @ 4:00 pm CST
Proposers with questions that were not addressed at the Bidder’s Conference must submit questions via email to mitchelli@westernwdb.org by this date/time. Please note “RFP Question” in the email subject line. Questions received after this date/time will not be addressed.

Questions and Answers posted to Western WDB Website..... May 4, 2018

Proposals Due: May 14, 2018 by 4:00 pm CST

Technical Committee Review, Evaluation, and Recommendation: May 14-May 21, 2018

Selected Contractor Announced May 22, 2018

Contract Starts:..... July 1, 2018

F. Proposal Format and Copies

The outside of the package should be marked in a readable format:

WIOA TITLE I Youth RFP

The provider name and address must be visible on the outside of the package.

Proposals must be one-sided, no smaller than 11-point font, typed, with 1” margins and securely bound. All pages, including attachments, must be numbered consecutively for easy reference, and a table of contents must be included. The page limit is 25 not including required attachments. One (1) clearly marked original, four (4) copies, and one (1) copy on USB device must be received at the stated location by the stated time. It is the responsibility to the proposer to ensure that the electronic file is accessible and readable.

Letters of recommendation will not be accepted. All proposals are to be submitted in accordance with the terms, conditions and procedures stated in the RFP.

G. Proposal Review and Evaluation Process

1. Proposal Review

There will be three phases for the Proposal Review and Evaluation Process. The policy for technical review is found on the Western WDB website at <http://www.westernwdb.org>

- **Phase I - Preliminary Review for Responsiveness** - Western WDB Staff will initially evaluate the proposal for completeness and responsiveness to requisite submission criteria. The following minimum criteria will be used to determine which proposals are responsive:
 - The proposal is submitted by the specified due date and is in accordance with the instructions in this RFP.
 - The required format is followed and accurate numbers of copies are submitted.

- All required elements and attachments are included
- Preliminary budgets are complete and required leverage is included.
- All forms with original signatures are included.

Any proposal not meeting Phase 1 Criteria will be deemed non-responsive and will not be submitted to the Technical Review Committee for further review.

- **Phase II – Technical Review** - Proposals meeting the minimum criteria for responsiveness, as stated above, will then be reviewed. A Technical Review Committee comprised of those who have no fiduciary interest in bidding for any of the WIOA programs and who have some expertise in workforce and/or in service delivery, will evaluate the technical merit of the proposal in accordance with the Western WDB Proposal Technical Review Policy. This policy will be posted on the website with the RFP (www.westernwdb.org).

Proposals will be scored based on evaluation criteria outlined in the RFP. These scores will identify the strongest proposals. The Western WDB retains the right to request reasonable additional information from any applicant, request presentations from applicants, or conduct interviews or site visits before a contract award. Any proposal approved for funding may be contingent on the results of a pre-award site visit that may be conducted by Western WDB staff. This site visit will establish, to Western WDB's satisfaction, whether the bidder is capable of conducting and carrying out the provisions of the proposed contract. If the results of the site visit indicate, in the opinion of the Western WDB that the bidder may not be able to fulfill contract expectations, Western WDB reserves the right not to enter into contract with the organization, regardless of Western WDB approval of the bidder's proposal.

If no response adequately addresses the RFP, or serves in the best interest of the Western WDB, the review team may recommend that no award be made.

- **Phase III** - The recommendations of the review team, will be presented to the Full Western WDB or Executive Committee for approval. All contract awards will be considered provisional pending receipt of any additional documentation regarding administrative qualifications, any other areas of concern, the successful completion of contract negotiations, and the availability of funds.

2. Proposal Evaluation Criteria

The Technical Review Committee will evaluate each submitted proposal based on the following:

1. Organizational Experience, Capacity and Past Performance. 15 points
2. Partnerships, Collaboration and Leverage 15 points
3. Program Design and Staffing..... 50 points
4. Budget - Program Cost 15 points
5. Overall Suitability and Innovation..... 5 points

The maximum number of points available is 100 points. Proposers must score a minimum of 75 points to be considered for a contract.

H. Procurement Information

1. Leverage of Funding:

WIOA Title I funds are intended to leverage employment and training funds in the area. At least 10 percent leverage funding is required and must be reported monthly.

2. Non-duplication of Services:

The Western WDB does not intend to fund any proposal that would duplicate any facility or service already available in WDA #9. Nor does it intend to fund any proposal for educational services from a non-educational agency unless it can be demonstrated these alternative services or facilities would be more effective or more likely to achieve performance goals. The Western WDB also requires the collaboration and coordination of services with employment and/or training providers in the WDA.

3. Proposal Conditions

This notice and subsequent proceedings **do not commit the Western WDB to enter into a contract with any of the proposal submitting parties.** The Western WDB will not pay any costs incurred in the preparation or presentation of proposals nor shall the Western WDB be liable for any costs incurred by the proposal submitter prior to the issuance of a contract. **The Western WDB reserves the right to accept, reject, or modify any or all proposals received as a result of this notice of RFP, or to cancel, modify or reissue in part or in its entirety this notice of RFP.**

This RFP may or may not result in an award of a subcontract. The Western WDB reserves the right, at its sole discretion, to cancel this RFP at any time and for any reason, and to reject any or all proposals at any time and for any reason. Receipt of proposals by the Western WDB confers no rights upon the proposer. Receipt of proposals shall not, in any manner whatsoever, obligate the Western WDB or any employees thereof.

If no proposals are received or no proposals received meet the minimum evaluation criteria, the Western WDB reserves the right to enter into contract negotiations and contract with any organization submitting a proposal under this RFP process. If no acceptable provider in a geographic area is identified, the Western WDB will arrange for the administration of the Program.

4. Withdrawals

A Proposer may withdraw a submitted proposal prior to the proposal due date. A written request to withdrawal must be submitted electronically to mitchellj@westernwdb.org.

5. Disqualification

Proposals not meeting the initial preliminary review will be disqualified. Additionally, proposals containing one or more of the following will not be considered nor are they subject to appeal:

- Incomplete or erroneous information, withholding material information or falsifying information will result in disqualification or subsequent contract termination.
- Inappropriate contact- to avoid actual conflicts, the appearance of conflicts or undue influence over the process, all prospective applicants, their employee, agents and sub applicants, etc. are prohibited from contacting any Western WDB staff or other persons identified by Western WDB regarding this RFP.

6. Appeal

Applicants will receive written notice advising them of Western WDB selection from this RFP. Non-selected applicants have the right to file one (1) original appeal. All appeals for non-award of funds must be made in writing. The letter must state that an appeal to the selection is being filed and all specific reasons for that appeal or disqualification must be based on one or more of the following:

- A conflict of interest on the part of one or more evaluators.
- Mathematical errors were made in the scoring of proposals.
- The evaluators did not adhere to the established rating criteria.
- Written appeals must be fully documented and must be postmarked and filed with:

Mark Glendenning, Chairperson
Western Wisconsin Workforce Development Board, Inc.
2615 East Avenue South, Suite 101, La Crosse, WI 54601

Appeals must be received in the above office no later than five (5) business days after receiving a written notification of non-award. For purposes of this provision, email or fax communications will suffice. Appeals must be faxed to (608) 789-6046 Attn: Julie Mitchell or emailed to mitchellj@westernwdb.org. Those appealing must confirm timely receipt by calling (608) 789-5499.

The Western WDB Chairperson will review the original appeal and determine whether or not the appeal meets one of the established criteria. The applicant will receive written notice advising as to whether or not their original appeal has been accepted or rejected within ten (10) calendar days from the appeal date.

In the event Western WDB Chair's response is not satisfactory to the applicant; one (1) subsequent appeal to the Chief Local Elected Official is permitted. This appeal must clearly state why the applicant believes a review is justified and must be submitted in writing within ten (10) calendar days from the date of the Chair's decision to:

Chief Local Elected Official (CLEO)
2615 East Avenue South, Suite 101,
La Crosse, WI 54601

For appeals denied by the Western WDB Chairperson, the proposer shall have the right to appeal the decision to the CLEO. The written appeal must be based on one or more of the factors listed above and must fully explain the basis for appealing the Western WDB Chairperson's denial. The written appeal to the CLEO must be sent by a traceable delivery

services with a signature required and received in that office no later than five (5) days after the appeal is denied by the Western WDB Chairperson. The CLEO shall review the appeal and render a final decision on awarding of the contract.

Decisions by the CLEO will be mailed to the applicant and are final. An original or subsequent appeal will not delay the Western WDB from conducting and concluding contract negotiations with the selected applicant(s).

7. Public Record

Applicants are advised that all documents obtained as part of this RFP process, and in the possession of WDB, are considered public records and subject to disclosure under the State of Wisconsin's Open Records Laws. There will be no public inspection of documents prior to the release of the intent to subcontract.

III. BACKGROUND AND GENERAL INFORMATION

A. Western Wisconsin Workforce Development Board, Inc.

The Western Wisconsin Workforce Development Board, Inc. (Western WDB) is a private, non-profit corporation dedicated to developing demand driven and innovative workforce strategies that cultivate a skilled and competitive workforce to meet the needs of employers in our region. The Western WDB envisions a region where businesses workforce needs are met and all individuals who want to work have self-sustaining employment. The Western WDB is committed to collaboration through strategic partnerships that share our values of honesty, integrity, innovation, accountability, and transparency. The following key workforce development strategies have been prioritized by the Western WDB:

Goal 1: *Satisfy the needs of business and job-seeking customers.*

The best way to satisfy the needs of all customers is through development of sustainable talent pipelines in the region's demand industries. Program services targeting job seekers should be developed and implemented using current business intelligence and labor market information. The focus for business will be on growing sector partnership groups. The focus for job-seekers will be on developing a training ecosystem that addresses workplace readiness and also using technology to increase access to program services and enhance the connection between job seeker and business.

Goal 2: *Create high impact workforce development solutions through results-driven collaboration.*

Efficient utilization and blending of resources is necessary to create a sustainable impact on businesses and job-seekers. The focus will be on building on existing programs and services to expand outreach into underserved populations and rural communities. Solutions will holistically address the needs of job-seekers to remove or reduce barriers to self-sufficiency. Technology will play an important role in creating the workforce of the future. Attention will need to be given to solutions that satisfy both the immediate needs and the future needs of business customers.

B. Workforce Development Area

The Western Wisconsin Workforce Development Board, Inc. serves businesses and job seekers in the Western Workforce Development Area (WDA 9). This area is comprised of Buffalo, Crawford, Jackson, Juneau, La Crosse, Monroe, Trempealeau and Vernon Counties. The City of La Crosse is the economic hub of the region.



Based on several different criteria, including projected growth, mean wages, total share of regional employment, gross regional product, and other data points, the Western WDB has identified the following as its focused industry sectors:

- Manufacturing;
- Health care;
- Construction,
- Transportation
- Information technology

The region is currently considered at full employment. The table below gives information on each county. Labor force and unemployment are as of the end of 2017. The Unemployment Rate is a snapshot from February 2018, and the population data is from the 2015 census. Careful analysis of this information should inform program design and service delivery strategies. More information can be found at <https://www.jobcenterofwisconsin/wisconomy>

Table 1	Labor Force (2017)	Unemployed (2017)	Unemployment Rate (2018)	Population (2015)
Buffalo County	6,626	248	4.3%	13,192
Crawford County	8,000	330	5.2%	16,391
Jackson County	10,479	352	4.1%	20,554
Juneau County	16,052	492	3.7%	26,224
La Crosse County	68,207	1,991	2.9%	118,212
Monroe County	23,649	698	3.2%	45,549
Trempealeau County	16,611	509	3.5%	29,550
Vernon County	13,664	457	3.5%	30,506
Total WDA #9	163,287	5,076	3.4%	300,178

Source: Wisconomy 2015-2018 data capture

Table 2 shows poverty rates in WDA 9. This information should also be used to inform program design.

Table 2	All poverty (All living in poverty in county/ All living in poverty in WDA)
Buffalo County	10.5%
Crawford County	14.2%
Jackson County	11.1%
Juneau County	14.4%
La Crosse County	13.3%
Monroe County	12.0%
Trempealeau County	8.2%
Vernon County	16.5%
Wisconsin	11.8%
U.S.	14.0%

Source: SAIFE

C. WIOA Program Overview

WIOA is a federal program funded through the U.S. Department of Labor and the State of Wisconsin Department of Workforce Development. WIOA is the main source of federal funds for workforce development activities throughout the nation. WIOA funding, which is distributed to states and, subsequently, sub-state agents, is used to serve two primary customers—businesses and job seekers. Services are managed and provided by local agents, which must meet performance goals set by DOL and the respective state oversight agency.

1. WIOA General Youth Provider Requirements

The following requirements apply to all young adult service respondents funded under WIOA. The WDB seeks proposals demonstrating collaborations with other agencies in order to access an appropriate range of services for participating youth. Proposals are expected to demonstrate capacity to fulfill all service requirements but may do so with partnerships.

2. WIOA Program Requirements

A. Program Design

Section 129 (c)(1) of the Workforce Innovation and Opportunity Act, states that funds allocated to youth service providers shall be used for the following program design:

1. Provide an objective assessment of the academic level, skill levels, and service needs of each participant, which assessment shall include a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs, and development needs of such participant.
2. Develop service strategies for each participant that shall identify career pathways that include education and employment goals, appropriate achievement objectives, and appropriate services for the participant taking into account the

assessment conducted.

3. Provide the following:
 - a) Activities leading to the attainment of a secondary school diploma or its recognized equivalent or a recognized postsecondary credential;
 - b) Preparation of postsecondary educational and training opportunities;
 - c) Strong linkages between academic learning and occupational learning;
 - d) Preparation for unsubsidized employment opportunities; and
 - e) Effective connections to intermediaries with strong links to the job market and local, regional employers.

The following is a list of fourteen (14) required services local programs must, at a minimum, provide to youth per Section 129 (c)(2) of the Act. If a provider does not directly provide the services listed, it must demonstrate the ability to make seamless referrals to appropriate providers of such services. The grantee will have primary responsibility for ensuring that each participant has access to the full continuum of services.

1. Tutoring, study skills training, and evidence based dropout prevention strategies that to completion of a secondary school diploma or its recognized equivalent or for a recognized postsecondary credential.
2. Alternative secondary school offerings.
3. Summer employment opportunities directly linked to academic and occupational learning.
4. Paid and unpaid work experiences, including summer employment opportunities, internships, pre-apprenticeship programs, job shadowing and on the job training opportunities.
5. Occupational skill training, which shall include priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in demand industry sectors or occupations.
6. Leadership development opportunities, which may include such activities as positive social behavior and soft skills, decision making, team work, and other activities;
7. Supportive services.
8. Adult mentoring for a duration of at least twelve (12) months, that may occur both during and after program participation.
9. Follow-up services for a minimum 12-month period.
10. Comprehensive guidance and counseling, including drug and alcohol abuse counseling, mental health counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth.
11. Financial literacy education.
12. Entrepreneurial skills training.
13. Services that provide labor market and employment information about in-demand industry sectors and occupations.
14. Activities that help youth prepare for and transition to post-secondary education and training.

B. Participant Eligibility

Funds awarded through this RFP will be used for WIOA eligible OSY ages 16-24 seeking

workforce services and ISY age 14-21. Individuals eligible for services must meet the following criteria:

1. Meet the general WIOA eligibility criteria:
 - a. Authorized to work in the United States; and
 - b. Registered for the Selective Service, if applicable.

2. Out-of-School Youth: An “out-of-school youth” shall be eligible to participate in these programs if such individual is:
 - a. Not attending any school (as defined under State law); and
 - b. Not younger than age 16 or older than age 24 at time of eligibility Determination; and
 - c. One or more of the following:
 - (i) A school dropout.
 - (ii) A youth who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter.
 - (iii) A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual and is:
 - (aa) basic skills deficient (as defined by the WDB); or
 - (bb) an English language learner.
 - (iv) An individual who is subject to the juvenile or adult justice system.
 - (v) A homeless individual, a homeless child or youth, a runaway, in foster care or has aged out of the foster care system, a child eligible for assistance under the Social Security Act, or in an out-of-home placement.
 - (vi) An individual who is pregnant or parenting.
 - (vii) A youth who is an individual with a disability.
 - (viii) A low-income individual who requires additional assistance (as defined by the WDB) to enter or complete an educational program or to secure or hold employment.

3. In School Youth: An ISY is an individual who is:
 - a. attending school (as defined by State law);
 - b. not younger than age 14 or (unless an individual with a disability who is attending school under State law) older than age 21;
 - c. a low-income individual; and
 - d. one or more of the following:
 - (I) Basic skills deficient.
 - (II) An English language learner.
 - (III) An offender.
 - (IV) A homeless individual (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e- 2(6))), a homeless child or youth (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))), a runaway, in foster care or has aged out of the foster care system, a child eligible for assistance under

section 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement.

- (V) Pregnant or parenting.
- (VI) A youth who is an individual with a disability.
- (VII) An individual who requires additional assistance to complete an educational program or to secure or hold employment.

SPECIAL RULE: the term “low-income”, used with respect to an individual, also includes a youth living in a high-poverty area. Census tract information must be used to validate use of this rule in regard to “low-income” eligibility criterion

C. Priority Target Populations

Based on the above eligibility requirements, and in addition to the requirement to spend a minimum of 75% of funds on OSY, the Western WDB has determined the priority target populations under this RFP as:

- a) Foster care age-outs (ages 16 to 18);
- b) Youth with offender status
- c) Pregnant or parenting youth
- d) Youth with disabilities

D. Follow-up Services

Appropriate follow-up services must be made available to participants for a **minimum of 12 months following the participant's exit from the program**. Contact must be made with participants monthly and documented according to Western WDB policy. Follow-up services can be useful for participants in order to maintain employment and provide a continuing link between the participant and workforce system; these services allow the one-stop to assist with other services the participant may need once he or she obtains employment. Examples may include assistance with employer benefits, health insurance, and financial literacy and budgeting assistance. All follow up services must be documented in accordance with program rules and Western WDB policies.

IV. PROGRAM REQUIREMENTS

A. WIOA Required Elements

The Workforce Investment and Opportunity Act is the funding source for this RFP. The Western WDB fully expects that the provider will be knowledgeable in the law and regulations for WIOA. Information can be found at <http://www.doleta.gov/wioa>. The provider must also adhere to the policies and strategies found in the WIOA Plan for Western Wisconsin and any future modifications. This plan may be found at www.westernwdb.org

The proposal for WIOA Youth Services must adhere to the broad categories outlined in the previous section and must provide the required design framework which include the following:

1. Performance and Outcomes

- Achieve established annual performance outcomes. The proposer must agree to meet and/or exceed:
 - Standards for each WIOA performance indicator as determined by the Department of Workforce Development (DWD).
 - Additional measures as may be set by the WDB to ensure compliance and continuous improvement.

The following table outlines the performance for Program Year 2017 (PY17). A program year runs from July 1 through June 30. The PY 18 performance standards have not been negotiated, but will have the PY17 standards as the minimum base and expect continuous improvement over PY17 performance.

Federal and DWD Standards	Measure
• Unsubsidized employment/education during 2 nd Quarter after exit	64%
• Unsubsidized employment/education during 4 th Quarter after exit	65%
• Median Earnings	TBD
• Credential Attainment Rate	64%
• Measurable Skills Gain	TBD

Definitions of the standards can be found at <https://dwd.wisconsin.gov/wioa/policy/11/11.5.htm>. The successful bidder must be knowledgeable of the standards, including measurement, reporting, tracking, and demonstrate the ability to achieve the level of performance expected.

2. Administrative Requirements

- **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, the Western WDB 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. The Western WDB will receive and disseminate all policies directly to the service provider.
- **Maintain files** - Files must be maintained for each participant in manner consistent with federal, state and local regulations and procedures, and with the Western WDB File Retention Policy found in the WIOA Plan.
- **Report data** - All data must be reported in the DWD authorized data system. Currently, ASSET is the system that will be used for client tracking. The selected contractor will be required to use ASSET to record and track all client activities and program services. Reports generated from ASSET will be utilized to determine program performance by the service provider, Western WDB, and the Wisconsin Department of Workforce Development. Knowledge of the ASSET system, accuracy, and timely entry of information is critical. System training will be facilitated by the Wisconsin Department of Workforce Development and/or staff of Western WDB, but it is the selected contractor's responsibility to ensure on-going staff expertise and cooperation.

In addition, the selected contractor may be required to provide additional documentation or information not accessible through ASSET to evaluate performance outcomes, as well as program strengths and weaknesses. Each contractor will need to display how outcomes will be tracked and managed.

- **Participate in monitoring** - At any time the Department of Labor, the Wisconsin Department of Workforce Development, or the Western WDB may monitor progress, and/or adherence to WIOA regulations or WDB expectations. The selected contractor must open records and allow monitors to perform their oversight duties.
- **Respond to WDB request for reports and/or data** - Financial and programmatic reports will be required monthly to the Western WDB and/or its fiscal agent. The selected contractor will be expected to adhere to other request from the Western WDB regarding performance, fiscal questions, or other matters relating to Western WDB business. The Western WDB reserves the right to contact the person who is directly in charge of overseeing the day-to-day activities of the WIOA program regarding any request for information or any other matter.
- **Transparency** - The Western WDB operates under open meeting laws and the Sunshine Act. The selected proposer must be aware of and adhere to open records for all WIOA matters and open meetings where WIOA is being discussed. The Western WDB considers all records and program plan funded under WIOA 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. The successful applicant will be required to use ASSET to record and track all participant activities, including services rendered and outcomes achieved. All business activity, including job placements or contacts made with business to set up work-based learning activities will be entered into JCW Business. All selected respondents will be required to attend training on ASSET and other DWD platforms such as JCW Business. In addition to reporting and tracking customers through ASSET and JCW Business, selected providers must submit monthly reports that document participant outcomes on key benchmarks. The Western WDB views information gathered by those paid by WIOA funding as available to the Western WDB and does not consider it to be proprietary to the selected provider. Confidentiality of shared information will be respected.
- **File Records, Retention and Ownership**
Selected respondents must retain program files and records, including customer files and records, in compliance with Federal and State WIOA requirements, and the Western WDB's record retention policies. Selected respondents must maintain and secure accurate case files for every WIOA-registered participant. Case files must contain a variety of documentation including, but not limited to: program eligibility/determination of need; assessment data; Individual Employment Plans (IEP); regular reviews of IEP; progress reports, time and attendance sheets (training services); and case notes. Selected respondents must allow local, state, and federal representatives access to all WIOA records, program materials, staff, and participants. In addition, bidders are required to maintain all WIOA financial and programmatic records for three years, beginning on the last day of the program year. Participant files must be turned over to the WDB upon conclusion of follow up services. The Western WDB will keep files for seven years, according to policy.

- **Oversight, Evaluation and Planning**

The Western WDB will monitor and evaluate selected respondents to determine if employer and job seeker clients are receiving the most comprehensive, streamlined set of services. We must also ensure program compliance and evaluate the quality and effectiveness of the service strategies. External monitoring and evaluation may also be conducted periodically by the U.S. Department of Labor, Wisconsin Department of Workforce Development, and any other agency that provides funds used by the Western WDB to contract for services in the area's workforce system.

- **Accessibility and Equal Opportunity**

The Western WDB is committed to equal access for all customers to all services. All bidders must ensure equal opportunity to all individuals. No individual in Western WDB's regional area shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any WIOA funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, sexual orientation, political affiliation or belief. All bidders 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 receive equal opportunity/accessibility training, developing policies and procedures regarding grievances, non-discrimination and equal opportunity, translation of program materials into other languages, accommodations for visual/hearing impaired individuals, ensuring website is fully accessible per the ADA laws, and may involve developing accessibility plans. All respondents must ensure all written materials and communications include the required Equal Opportunity statements which will be included in the provisions of the contract to the selected entity.

B. WDB Program Expectations

In addition to the requirements of the WIOA and/or the State of Wisconsin, the Western WDB has set the following program expectations.

1. Thorough knowledge of local and regional labor supply

The selected contractor will demonstrate a strong understanding of the area's workforce demographics/labor supply, as well as the needs of the local labor market in order to effectively bridge gaps between the supply and the market. The contractor will not only be required to demonstrate knowledge of the current market and supply, but also the future market and supply. The contractor must demonstrate the ability to use historical and current data to forecast future market and supply needs. The Western WDB expects the contractor to stay abreast of fluctuations in both the supply and the market and utilize this information to inform programming.

2. Location/Availability of Services

The Contractor will offer services to youth throughout WDA 9. The Western WDB requires the contractor to fully utilize the comprehensive job centers in the area and make services available to eligible individuals in all counties in WDA #9. Currently, the comprehensive job centers are:

Wisconsin Workforce Development Center - La Crosse County
2615 East Avenue South
La Crosse, WI 54601

Job Center of Wisconsin- Monroe County
120 E. Milwaukee Street
Tomah, WI 54660

3. Job Centering

The selected contractor will be a required team member of the comprehensive job centers and as such will be a party to the Memorandum of Understanding for the Job Center. The contractor will be expected to develop relevant workshops geared toward youth that can be offered at the job centers or in the community.

As a Job Center partner, the selected contractor is required to assume membership on the committees and teams of the one stop. At minimum, the contractor will assign a staff member to serve on:

- **Business Services Team** – The selected contractor for WIOA services is expected to collaborate with job center partners and community partners in the delivery of services to employers. Activities will include but not be limited to job fairs, application screening, employer on-site recruitment activities, job orders and follow-up and other activities that the team may develop or promote. This team is charged with developing the Business Services Plan for the comprehensive job centers.
- **Employer Services Team** – The provider of WIOA services is expected to collaborate with other job center partners on delivery of resource room and workshops. Non-duplicative, collaborative provision of these services is required.

4. Community Collaboration

The Western WDB promotes collaboration and non-duplication of services in the community. The selected contractor for WIOA services is expected to work with providers of other workforce development and economic development agencies in the area to ensure that WIOA Title 1 services are not duplicative of those offered in the region.

5. Demand Sectors

The Western WDB considers employers, especially those in demand industries, as its primary customer. As such, Western WDB partners with other workforce development organizations in a tri-state region to address the workforce needs of regional demand industries. The Western WDB has identified the following sectors as demand industries in Western Wisconsin:

- Manufacturing
- Healthcare
- Construction
- Transportation
- Information Technology and Software Design

There are sector based organizations in the region that address the skill needs of workers. While there may be others, The Upper Mississippi Manufacturer Association (TUMMA, www.tumma.org), the La Crosse Builders Association (<http://labaonline.com>), and the La Crosse Medical Health Science Consortium are fully operational and work to advance the skill sets needed by their respective sector.

The Western WDB expects the selected contractor for WIOA Youth services to engage these business groups, utilizing the Business Services Coordinator to maximize efficiency, to ensure that participants in the WIOA program are being trained to industry standards and the needs of the sector. Evidence of collaboration and leverage for program service with these sector groups is required.

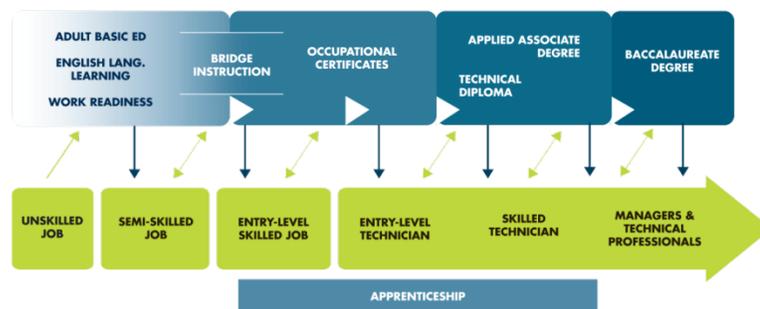
7. National Career Readiness Certificate (NCRC)

The State of Wisconsin and the DOL have recognized the National Career Readiness Certificate as a portable credential that demonstrates the level of an individual's employability skills. Individuals can earn the certificate through taking three assessments: Reading for Information, Locating Information and Applied Mathematics. The Western WDB expects that the selected contractor for WIOA Title 1 services will engage in this initiative and encourage individuals enrolled in WIOA to seek NCRC certification. The Western WDB also expects that the selected contractor will actively promote this certificate to employers in the area. <http://www.act.org/products/workforce-act-national-career-readiness-certificate/>

8. Career Pathways

The Western WDB acknowledges the Career Pathways model for promoting lifelong learning and career upward mobility. Western Technical College and the Wisconsin Technical College System have developed several career pathway models to ensure adults and dislocated workers can move easily between school and work while earning stackable credentials that lead toward an associate degree or higher. UW-L and Viterbo University have also begun offering short term training certificates in demand industries.

WISCONSIN CAREER PATHWAYS



The Western WDB expects the selected contractor for WIOA services to be an active partner in the career pathway initiative and to engage with local technical colleges and other post secondary institutions in ensuring that WIOA participants have the entry level and life skills needed for successful movement along the pathway. The Western WDB expects WIOA training funds to primarily be used for training that has an established, articulated pathway.

9. Marketing and Branding

The selected contractor will comply with marketing and branding requirements of the Western WDB. Any WIOA-related print or electronic marketing material, including descriptions on website will be consistent with WIOA regulations regarding material identifiers. Additionally, selected contractor will comply with all DOL American Job Center logo and DOL/DWD equal opportunity statement requirements.

10. Staffing and Caseload Size

As unemployment continues to be low, new ways of doing business must be utilized to reach hidden talent pools and use the limited funds effectively. WIOA funds are not intended to supplement other programs or organizational goals, and therefore should be the focus of staff who will provide WIOA services. The staffing pattern should be built around full-time positions. The Western WDB is only interested in partially funding positions to share a workload or program responsibilities that are aligned with the intent of WIOA and benefit the program goals and outcomes. Proposers are highly recommended to articulate any such alignments and the benefits to the proposed staffing pattern in the respective narrative sections of the proposal. Failure to adequately do so will result in loss of points. If necessary, follow-up questions may be requested or included as part of contract negotiations.

In response to the current economy, more attention must be given to outreach and recruitment of participants. While proposers may propose any positions in the staffing pattern, the staffing patterns must include the following positions:

- a. **Outreach Specialist** – This position is intended to be a full-time position dedicated to building community relationships to create program awareness and to conduct participant outreach. The outreach responsibilities may include engagements outside of the traditional setting. These engagements may be related to specific projects or to presentations in a variety of settings. This position, under the umbrella of basic career services, will also be required to develop and offer job-seeker workshops that are intended to increase knowledge of local job market and training options and/or increase employability, as well as used as a recruitment tool. Some of the workshops may be open to the public. This position is not intended to carry a caseload, but may play a role for participants who are enrolled in short-term training programs. Flexibility and the ability to accommodate various populations in a variety of settings will be essential. This will be expected to travel throughout the WDA as necessary to recruit participants in rural areas. Outreach activities and outcomes will be reported to the Western WDB monthly.
- b. **Career Planners** – These positions are intended to be full-time positions with duties including eligibility determination/documentation, internal/external referrals, assessments designed to inform employment/training planning, employment planning, support services to reduce barriers, case

management, and follow-up services. These positions are not required to be housed in the two comprehensive job centers (La Crosse and Tomah), but must spend time in the job centers to introduce youth participants to the job center resources and to ensure strong collaboration between youth and adult services. Travel will be required to ensure services are delivered in all counties. Career Planners are expected to utilize community resources and meeting locations such as public libraries to provide services outside of the job centers. Deviation from this approach must be clearly explained and justified, including explanation of how a different approach represents greater efficiencies such as cost savings or better service delivery for WIOA services. Justification should be in terms of how WIOA funds utilization and services would be improved, not in terms of benefits to the proposing organization.

Proposers should include these positions in their staffing patterns, along with other proposed positions in numbers sufficient to realize the desired program outcomes. NOTE: Proposers may also suggest variations of the positions. For example, if caseloads are projected to be smaller in rural areas (under 30 total active/follow up participants), proposer may suggest a staffing pattern that combines the Outreach Specialist and Career Planner positions. Justification must be provided if this is the case, with projected percentage FTE spent on each. Justification should be in terms of how WIOA funds utilization and services would be improved, not in terms of benefits to the proposing organization.

Caseload size will vary, but full-time WIOA Career Planners are expected to carry caseloads of around 30 active and follow up (total) participants. This caseload size should be reflected in the staffing pattern to justify the number of Career Planners in the pattern. In counties where numbers are lower, consideration should be given to expanding the Career Planner's territory to cover a larger geographic area or combining the Outreach Specialist and Career Planner positions. In order to maintain a focus on providing services to participants, the WDB will monitor caseload sizes to ensure the staffing pattern is efficient.

12. New Enrollments

There will be a number of participants carried into the new contract. At this time, that number is unknown. In addition to the participants carried into the new contract, the selected contractor will be expected to enroll a minimum of 30 new participants in the WIOA Youth program during Program Year 2018.

13. Key Service Delivery Outcomes

The successful proposer is expected to deliver services in a manner aligned with the priorities of the Western WDB. These outcomes are a new focal point for the upcoming program year. Proposers should articulate in the narrative sections of their proposal how they will reach the following outcomes:

- a. Increased awareness of and access to services via technology

- b. Enrollment in rural areas, proportionate to the percentage population of area with regard to overall population of the western WI Workforce Development Area
- c. Enrollment of youth offenders, including collaboration with other agencies who serve this population and co-enrollment
- d. Enrollment of Hispanic and Hmong participants, proportionate to representation of these populations in geographic areas with higher concentrations of these populations
- e. Primary focus on expanding work-based learning (OJT, Youth Apprenticeship, and internships) as a training option in demand industries
- f. Enrollment in post-secondary, short term training programs
- g. Leverage of existing resources such as the Business Services Coordinator and TUMMA (manufacturing industry partnership)

V. PROPOSAL RESPONSE ITEMS

Each proposal must use the following outlined sections for formatting. Each section must be clearly labeled and should follow the order listed below. To be eligible to receive the maximum number of points for each section, the proposal must address all the questions and issues included in each section.

A. ORGANIZATIONAL EXPERIENCE, CAPACITY AND PAST PERFORMANCE - 15 Points (Max 2 pgs)

1. Please complete the Agency Identification Form. Include as the cover page (does not count toward page maximum).
2. Describe your agency's mission, vision, and service expertise and how this proposal relates to your organization's goals and to Western WDB's work.
3. Agency's Experience in Managing WIOA Programs
 - a. Please describe your agency's experience in administering WIOA programs and/or any experience with other employment and training programs, state or federal government-funded programs, or other workforce support programs. Include the following in a table format as **Attachment A**:
 - Name of program
 - Amount of funding
 - Description of services
 - Geographic area served
 - Demographics of service recipients
 - Outcomes, including number served and numbers placed/retained
 - b. Describe your organization's experience with developing employer relationships/services, job development and job placement that promote self-sufficiency. Describe your organizations strategy and achievements in retaining

placements in their jobs.

- c. Describe your organization's experience serving in and out of school youth. Include in your description your experience with the priority target populations identified in this RFP. Also describe your experience using technology to enhance/expand services, strategies for successful outreach to rural youth and minority youth, and experience with work-based learning and post-secondary training.
- d. Describe how you have collected and used labor market information and business intelligence to forecast workforce needs and how you used this information in your program design and service provision.

4. Fiscal Policies, Procedures and Internal Control

- a. Describe your contract management structure to provide supervision to staff. Provide an organizational chart representing staff alignment and accountability as **Attachment B**.
- b. Describe how staff is trained on allowable cost policies and how staff determines that a cost is appropriate within the scope of the contract. Please describe the system used to pay participants (work-based learning) and to provide support services. How do you document payments and support services?
- c. Describe your organization's experience in managing state and federally-funded programs and the financial management practices you use, including application of Uniform Guidance and acceptable accounting practices and controls.

5. Audit and Financial Strengths

- a. Please provide one set of audit reports for each of the last two (2) years, including management letters, and the current operating budget to provide a picture of your agency's financial and business status. If an audit has not been performed, provide a financial statement(s) or a balance sheet(s) and other information that documents the financial status of your agency. Required Attachment - **Label as Attachment C**.
- b. Do you have any potential claims or liabilities? If so, please explain.
- c. Please provide a summary of all insurance information and coverage for your agency. Required Attachment - **Label as Attachment D**.

6. Financial and Programmatic Monitoring

- a. Describe your internal review/monitoring practices. Include the specific content areas that you plan to monitor and how the results will be documented, utilized, and reported to WDB staff.
- b. Describe your agency's plan to measure its internal review processes to ensure that they are being followed, they are effective, and how they provide for continuous

improvement. In addition, explain how your agency will provide this information to the WDB. If your agency has a Continuous Improvement Plan that outlines how you proactively identify and address areas needing improvement, please provide a copy. Required Attachment – **Label as Attachment E.**

B. COLLABORATION, PARTNERSHIPS AND LEVERAGE - 15 Points (Max 1 pg)

1. Describe your organizational experience in partnering with other organizations to meet the workforce development needs of youth. Describe the services provided, outcomes, and key successful strategies. Also include description of your organization's role in the partnership.
2. Describe your experience with an integrated service delivery model, information sharing, case management of co-enrolled participants, cross-training of staff, and shared performance and accountability.
3. Describe other programmatic resources, programs, or experiences that you will bring to align and augment the American Job Center menu of services, targeted populations, and/or WIOA Title 1 outcomes.
4. Describe how you intend to meet the 10% leveraged funding requirement.

C. PROGRAM DESIGN AND STAFFING - 50 points (see individual section page limits)

1. Program Design Section – 25 points (max 11 pgs)
 - a. Describe how services will be offered to individuals in an area with no comprehensive job center. Include in your description how you will minimize participant travel time and cost to access services. Include strategies to serve those who may have barriers to travel from remote areas to the comprehensive job centers.
 - b. Describe the processes you will use to ensure that WIOA performance standards are met, including how you will ensure that data entered into ASSET or any subsequent data system required by the State of Wisconsin Department of Workforce Development is accurate, verified and timely.
 - c. Describe how you will ensure adequate expenditures on work experience and other work-based learning opportunities to meet the 20% of allocation requirement.
 - d. Describe your intake and orientation process. Describe how you will assess the current status and employment/training/support service needs of each individual participant, including the assessment instruments you will use.
 - e. Describe how your program design is responsive to the regional labor market and available labor supply, specifically using data to support your program design. Describe how you will use data to forecast future labor market and supply needs, including what data will be used (source) and how it will be analyzed to project future needs.

- f. Describe how you will collaborate with the Adult and Dislocated Worker service provider to ensure seamless services and access to the full array of workforce resources.
 - g. Describe how you will identify and address participant barriers. Include examples of barriers you expect to see and how you plan to assist participants to reduce or resolve them.
 - h. How will you ensure that a minimum of 75% of funding will be used for OSY?
 - i. Describe how the case management practices of your organization will impact participant success. Highlight any innovative practices used to increase participant engagement/retention.
 - j. Describe how both group and individual activities will be incorporated into the service delivery plan to maximize efficient use of resources.
 - k. Provide a detailed description of how you will make all 14 Program Elements (identified in Section 129(c)(2) of WIOA and listed on page 12 of this RFP) available to eligible youth participants. Address each element separately and give at least one example of a service that is available for each element, including how and where the service can be accessed by participants. If you do not plan to directly provide a service, describe how you will make the service available to youth participants through referrals or other means. Highlight innovative approaches and efforts to utilize the existing workforce and American Job Center resources to coordinate service delivery.
 - l. Provide a detailed description of how you will incorporate the thirteen WDB Program Expectations (found on pages 17-21) into your program design and service delivery model. Address each expectation separately, including each element in the Key Service Delivery Outcomes (#13). Highlight innovative approaches and efforts to utilize the existing workforce and American Job Center resources to coordinate service delivery.
2. Staffing Section – 25 points (max 11 pgs)
- a. Explain the composition of proposed staff, including position title, number of staff proposed for each position. Also include proposed primary location of staff and how the geographic area of the WDA will be distributed among Career Planner staff. Provide justification for your staffing plan and the impacts expected. If your staffing plan deviates from the preferred staffing pattern outlined in this solicitation, please provide adequate justification including how your staffing plan will achieve the program outcomes.

- b. Describe how you will be flexible with staffing. Explain some of your innovative personnel policies or practices and your ability to shift staff responsibilities and hours of service to respond to demands. Provide examples as appropriate to support your response.
- c. Describe your plan for having a physical presence at both comprehensive job centers. Include how many days/hours you plan to be present at each job center and what activities will be engaged in while at the job centers.
- d. Describe your plan to ensure staff is well-trained and ready to deliver WIOA services. Include training topics you feel are critical to support service delivery and outcomes.
- e. Describe what you envision as necessary qualifications, characteristics, or experience for the Outreach Specialist position. Be specific and use examples to support your response.
- f. Describe your experience with recruitment, including essential elements of your approach and how effective your previous recruitment strategies have been.
- g. Describe how information on American Job Center services and WIOA resources and opportunities will be communicated to youth, workforce partners, education partners, and community partners.
- h. Describe how and what you will track and report regarding the activities and impacts of the Outreach Specialist position. Include performance goals you envision and how you will evaluate the success of this position.
- i. Describe what technology will be needed to support the Outreach Specialist position.
- j. What other roles or functions do you envision for the Outreach Specialist position to maximize impacts and outcomes?
- k. Describe what you envision as necessary qualifications, characteristics, and experience for the Career Planner position? Be specific and include examples to support your response.
- l. Describe what you envision as essential considerations and elements of a quality employment plan.
- m. Describe how and what you will track and report regarding the activities and impacts of the Career Planner position. Please include performance goals and how you will evaluate the success of this position.
- n. What other roles or functions do you envision for the Career Planner position to maximize impacts and outcomes?

- o. Describe any other positions you will have in your staffing pattern and how those positions will be evaluated for impacts and success in promoting achievement of program outcomes. Provide justification for why this position is included in your staffing pattern and how the position contributes to program outcomes.
- p. Please include resumes of key staff who are in your staffing plan as **Attachment F**.

D. BUDGET INFORMATION

15 points

- 1. Please complete each tab of the provided budget spreadsheet and staffing pattern.

E. REQUIRED FORMS

Please Attach

- ATTACHMENT A Organizational Chart
- ATTACHMENT B Previous 2 Audit Reports
- ATTACHMENT C Insurance Information
- ATTACHMENT D Continuous Improvement/Monitoring Plan
- ATTACHMENT E Key Resumes
- ATTACHMENT F Budget Worksheet
- FORM A Cover Sheet – insert as cover sheet of narrative
- FORM B Assurances
- FORM C Equal Opportunity Form
- FORM D Statement of Non-Collusion
- FORM E Proposed Levels of Service Form



FORM B – 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 an 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 ensure special efforts to prevent fraud and other program abuses such as but not limited to: deceitful practices, intentional misconduct, willful misrepresentation, and improper conduct which may or may not be fraudulent in nature.
6. I understand that final funding for any services is based on funding levels and approval by the Western Wisconsin Workforce Development Board, Inc. and the Western WDB reserved the right to accept or reject any proposal.

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

- Providing records of our most current audit
- 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 Western WDB 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 provided by the WDB.

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 funds for activities that would interfere with or replace regular academic requirements for eligible youth who are not dropouts.
- Use WIOA funds for lobbying.

I hereby assure that all of the above are true.

Name	Title	Date
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**FORM C - Equal Opportunity Nondiscrimination Assurance and Affirmative Action Plan Requirements
Compliance Form**

Bidders and successful contractors must, as a condition of receiving Federal assistance, acknowledge and agree to comply with (these requirements apply to any other sub-grantee, sub-contractor, successors, transferees, and assignees that is extended Federal assistance under this sub-contract), to comply with applicable provisions of national laws and policies prohibiting discrimination, including but not limited to:

- Title VI of the Civil Rights Act of 1964, as amended, prohibits discrimination on the basis of race, color, or national origin (42 U.S.C. 200d et seq.), [as implemented by the Department of Labor (DOL), 29 CFR Part §31.
As clarified by Executive Order 13166-Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination on the basis of Limited English Proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access and equal opportunity to your program in accordance with DOL Enforcement of Title VI of the Civil Rights Act of 1964 Federal Register Vol. 68, No. 103.. Meaningful access may entail providing language assistance services, including oral and written translation, where necessary. You are encouraged to consider the need for language services for LEP persons served or encountered both in developing your budgets and in conducting your programs and activities. For assistance and information regarding LEP obligations, go to <http://www.lep.gov>;
- Title IX of the Education Amendments of 1972 as amended, prohibits discrimination on the basis of sex in education programs or activities (20 U.S.C. 168 et seq.), as implemented by the DOL 29 CFR Part § 36;
- The Age Discrimination Act of 1975, as amended, prohibits discrimination on the basis of age (42 U.S.C. 6101) as implemented by DOL 29 CFR Part §35;
- Section 504 of the Rehabilitation Act of 1972, as amended, prohibits discrimination on the basis of disability (29 U.S.C. 794) as implemented by DOL 29 CFR Part §32;
- Title VII of the Civil Rights Act of 1964, prohibits discrimination on the basis of race, color, religion, national origin, or sex (including gender identity, sexual orientation and pregnancy),protection is afforded to individuals due to retaliation for having file a complaint of discrimination.
- The Age Discrimination Act of 1967 (ADEA)
- The Genetic Information Nondiscrimination Act of 2008 (GINA), prohibits discrimination on the basis of genetic information with respect to health insurance and employment.
- The Equal Pay Act of 1963 (EPA), makes it illegal to pay different wages to men and women if they perform equal work in the same workplace and retaliation against persons because the person complained
- Title I, II, and III of the American with Disability Act of 1990, which prohibits discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain entities conducting testing (42 U.S.C. §§ 12131 – 12189), as implemented by the Department of Justice regulations at 28 C.F.R Part 35 and 36.

- The successful bidder/contractor acknowledges and agrees that it must comply and require any sub- grantees, sub-contractors, successors, transferees, and/or assignees to also comply with all applicable provisions governing the Western Wisconsin WDB and allow DWD-DET and DOL access to records, accounts, documents, information, facilities, and staff as follows:
- The Bidder/Contractor must cooperate with any compliance review or complaint investigation conducted by the Western WDB or DWD-DET.
- The Bidder/Contractor must give the Western WDB DWD-DET, and/or DOL access to and the right to examine and copy records, accounts, and other documents and sources of information related to the grant. Must also permit access to facilities, personnel, and other individuals and information as may be necessary, as required under DOL provisions at, 29 CFR Part §31.5 (c), 29 CFR Part §32.44 (c), and 29 CFR Part §38.40.
- The Bidder/Contractor must keep such records and submit to the responsible Department official or designee timely, complete, and accurate compliance reports at such times, and in such form and containing such information, as the responsible Department official or his designee may determine to be necessary to ascertain whether the Bidder/Contractor has complied or are complying with relevant obligations.
- The Bidder/Contractor must comply with all other reporting, data, collection, and evaluation requirements, as prescribed by law or detailed in program guidance.
- If, during the past three years, the Bidder/Contractor has been accused of discrimination on the basis of race, color, national origin (including LEP), sex (include gender identity, gender expressions, and sex stereotyping, and on the basis of the student’s pregnancy, childbirth, false pregnancy, termination of pregnancy or recovery therefrom), age, disability, religion, or family status, against the Bidder/Contractor, or the Bidder/Contractor settled a case or matter alleging such discrimination, you must provide a list of such proceedings, pending or completed, including outcome and copies of settlement agreements.
- In the event any court or administrative agency rules there is a finding of discrimination on the basis of race, color, national origin, (including LEP), sex (include gender identity, gender expressions, and sex stereotyping, and on the basis of the student’s pregnancy, childbirth, false pregnancy, termination of pregnancy or recovery therefrom), age, disability, religion, familial status, against the Bidder/Contractor or the Bidder/Contractor settle a case or matter alleging such discrimination, you must forward a copy of the complaint and findings the Western WDB Manage).
- The Western WDB, the Department of Workforce Development, Division of Employment and Training and the United States Department of Labor have the right to seek judicial enforcement of these obligations.
- The Bidder/Contractor also acknowledges and agrees that it must comply with (and requires any sub- grantees, sub-contractors, successors, transferees, and assignees to comply) with applicable provisions of the Section 188 of WIOA nondiscrimination policy requirements and regulations at 29 CFR Part §38.

- Under penalty of perjury, the undersigned officials certify that they have read and understand their obligations as herein described, that the information submitted in conjunction with this RFP document is accurate and complete, and that the Bidder/Contractor is or will come into compliance with the nondiscrimination requirements set forth above.

Submitting / Lead Organization

Authorized Representative Signature

Date



FORM D STATEMENT OF NON-COLLUSION

All proposers must sign a Statement of Non-Collusion and return it with their RFP. The content of the statement is as follows:

“By submission of this RFP, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint RFP each party thereto certifies as to its own organization, under penalty of perjury, that to the best of knowledge and belief:

The prices of this RFP have been arrived at independently without collusion, consultation, communication, or agreement for the purpose of restricting competition, as to any matter related to such prices with any other proposer or with any competitor;

Unless otherwise required by law, the prices which have been quoted in this RFP have not been knowingly disclosed by the proposer and will not knowingly be disclosed by the proposer prior to opening, directly or indirectly, to any other proposer or to any competitor; and

No attempt has been made or will be made by the proposer to induce any other person, partnership or corporation to submit or not to submit a RFP for the purpose of restricting competition.”

The statement must be signed by the CEO of the proposer or other authorized individual

Name Title

Signature Date



FORM E PROPOSED LEVEL OF SERVICE FORM (annually)

Geographic Dispersion of Services

COUNTY	PROJECTED NUMBER OF CARRY-INS			NEW ENROLLMENTS			PROJECTED NUMBER OF EXITS			TOTAL SERVED		
	ISY	OSY	TOTAL	ISY	OSY	TOTAL	ISY	OSY	TOTAL	ISY	OSY	TOTAL
BUFFALO												
CRAWFORD												
JACKSON												
JUNEAU												
LA CROSSE												
MONROE												
TREMPEALEAU												
VERNON												

Key Service Delivery Outcomes

OUTCOME	Projected number to be enrolled	Projected number engaged				Projected number successfully completing			
Enrollment of offenders									
Enrollment of Hispanic population									
Enrollment of Hmong population									
Work-based Learning		OJT	Work Exp – Demand Industry	Work Exp – Other	Youth Apprentice	OJT	Work Exp – Demand Industry	Work Exp – Other	Youth Apprentice
Short term certificates		Demand industry			other	Demand industry			Other

Numbers should reflect total ISY/OSY combined. Please make sure your narrative reflects your responses in the table, including how you will achieve the numbers.

PROPOSAL CHECKLIST

PROPOSER'S CONFERENCE and QUESTIONS	Included/Done
Proposer Conference: April 26, 2018 @ 11:00am	
Questions submitted by May 1, 2018	
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 number of copies and electronic copy are included in packet.	
All forms are included and signed	
RFP NARRATIVE (Limited to 25 pages)	
A. Organizational Experience, Capacity and Past Performance	
B. Collaboration, Partnership and Leverage	
C. Program Design and Staffing	
RFP FORMS	
FORM A – Use as Cover Sheet	
FORM B - Assurances	
FORM C – Equal Opportunity Form	
FORM D – Statement of Non-collusion Form	
FORM E - Proposed Levels of Service Form	
ATTACHMENTS	
Attachment A – Organizational Chart	
Attachment B – Audit Reports (2 recent years)	
Attachment C – Insurance Information	
Attachment D – Continuous Improvement/Monitoring Plan	
Attachment E – Key Resumes	
Attachment F – Budget Worksheets	

APPENDIX I Provisions and Disclaimers

Western Wisconsin Workforce Development Board, Inc.
RFP for Business Services Coordinator
June 2016

1. All solicitations are contingent upon availability of funds.
2. This RFP is for 12 months and is renewable for an additional 12 months at the discretion of the Western WDB.
3. Western WDB reserves the right to accept or reject any or all proposals received.
4. Western WDB reserves the right to waive informalities and minor irregularities in the proposals received.
5. This RFP does not commit Western WDB to award a contract.
6. This RFP is for WIOA services and other related programs and funding streams which may become available to Western WDB during this funding period.
7. Western WDB may accept any item or group of items of any proposal, unless the proposal qualified its offer by specific limitations.
8. Western WDB may select a service provider based on its initial proposal received, without discussion of the proposal. Accordingly, each proposal should be submitted on the most favorable terms from a price and technical standpoint that the bidder can submit to Western WDB.
9. Proposals should follow the format set forth in the RFP Response Package section of the RFP and adhere to the minimum requirements specified therein.
10. Western WDB retains the right to request additional information from any applicant, request oral presentations from applicants, or conduct site visits from any applicant before a contract award.
11. No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies under WIOA.
12. All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to the Western WDB and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
13. The final award and execution of a contract is subject to receipt of WIOA funds, Western WDB's satisfactory negotiation of the terms of the contract, and the continued availability of funds.
14. Any changes to the WIOA program, performance measures, funding level or Western WDB direction may result in a change in contracting. In such instances, the Western WDB shall not be liable for any damage arising from this Request for Proposals package or subsequent contract.
15. Proposals submitted for funding consideration must be consistent with, and if funded operated according to, the federal WIOA legislation, all applicable federal regulations, State of Wisconsin policies, and Western WDB policies and procedures.
16. Bidders selected for funding must also ensure compliance with the following, as applicable: US Department of Labor (DOL) regulations 2 CFR Part 200, 2 CFR Part 2900: DOL Exceptions to 2 CFR Part 200, 48 CFR Part 31, 29 CFR Part 93, 37 and 98, 20 CFR Part 652 et al.
17. Bidders will be expected to adhere to Western WDB procedures to collect, verify, and submit required data and submit monthly invoices to Western WDB.
18. Additional funds received by Western WDB may be contracted by expanding existing programs or by consideration of proposals not initially funded under this RFP. These decisions shall be at the sole discretion of Western WDB.
19. Western WDB may decide not to fund part or all of a proposal even though it is found to be in the competitive range if, in the opinion of the Western WDB the services proposed are not needed, or the costs are higher than Western WDB finds reasonable in relation to the overall funds available, or if past management concerns lead Western WDB to believe that the bidder has undertaken more services than it can reasonably provide.

APPENDIX I – page 2

20. Any proposal approved for funding is contingent on the results of a pre-award site visit that may be conducted by Western WDB staff. This site visit will establish, to Western WDB's satisfaction, whether the bidder is capable of conducting and carrying out the provisions of the proposed contract. If the results of the site visit indicate, in the opinion of the Western WDB that the bidder may not be able to fulfill contract expectations, Western WDB reserves the right not to enter into contract with the organization, regardless of Western WDB approval of the bidder's proposal.
21. Western WDB is required to abide by all WIOA legislation and regulations. Therefore, Western WDB reserves the right to modify or alter the requirements and standards set forth in this RFP based on program requirements mandated by state or federal agencies.
22. All contractors must ensure compliance with the State of Wisconsin Department of Workforce Development (DWD)'s Civil Rights Compliance plan and expectations and provided equal opportunity to all individuals. No individual shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any WIOA-funded program or activity because of race, color, religion, sex, national origin, age, disability, or political affiliation or belief.
23. All contractors must ensure access to individuals with disabilities pursuant to the Americans with Disabilities Act.
24. Bidders selected for funding must ensure equitable access to clients with limited English speaking, reading or writing ability and upon contracting will need to identify a Limited English Proficiency (LEP) coordinator as part of the Civil Rights Compliance planning.
25. Contractors must accept liability for all aspects of the WIOA program conducted under contract with Western WDB. Bidders will be liable for any disallowed costs or illegal expenditures of funds or program operations conducted.
26. Contractors must have an established grievance and complaint process and procedure to address any customer concerns, complaints or grievance. Any such complaints or grievances must be documents and addressed and resolved if possible prior to the engagement of the Western WDB complaint and grievance process.
27. 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 the federal or state governments.
28. Contractors will allow local, state, and federal representatives access to all related records, program materials, staff, and participants. In addition, bidders are required to maintain all contract related records for the period required by State of Wisconsin DWD record retention requirements, beginning on the last day of the program year.
29. The contract award will not be final until Western WDB and the successful bidder have executed a mutually satisfactory contractual agreement. Western WDB reserves the right to make an award without further discussion of the proposal submitted. No program activity may begin prior to final Western WDB approval of the award and execution of a contractual agreement between the successful bidder and WDBSCW.
30. Contracts will be cost reimbursement only. Developed budgets shall define anticipated costs associated with the delivery of proposed service plan.
31. The Western WDB 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.
32. Western WDB 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. Bids submitted which are over the maximum amount of funds specified for this RFP will be rejected. The submission of 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.

33. The Western WDB reserves the right to reject any or all proposals received and to negotiate with any and all bidders on modifications to proposals.
34. Each party shall be responsible for the negligence of its own employees or agents in the performance of this contract. All successful bidders shall provide a certificate of liability insurance, providing commercial general liability coverage in the amount of \$1,000,000.00 for each occurrence, automobile liability, workers compensation and professional liability insurance, if applicable. The contractor will provide a certificate of insurance satisfactory to WDBSCW.
35. Applicants are advised that most documents in the possession of the Western WDB are considered public records and subject to disclosure.

Policy for the Technical Review of Proposals

Effective May 19, 2016 – upon approval of Executive Committee
Amended on June 3, 2016 to be in compliance with Uniform Guidance
Ratified by Full WESTERN WDB on June 20, 2016
Amended and ratified by Executive Committee on March 26, 2018

I. Introduction and Purpose

This policy has been developed to guide the process of performing a technical review of proposals submitted as part of the overall procurement process for identifying and selecting service providers for the funds administered by the Western Wisconsin Workforce Development Board (Western WESTERN WDB). While the *Procurement Policy* governs the broad process of procurement, this policy intends to govern the actual review of proposals in alignment with the WESTERN WDB Procurement Policy. This policy also was used to develop the *Proposal Technical Review Procedures*.

II. Selection of Technical Review Committee

The WESTERN WDB will designate three individuals to participate on the Technical Review Committee (TRC). Two of the individuals will have participated in the development of the technical specifications of the Request for Proposal (RFP) in order to be considered “experts” in regard to the technical requirements. One individual will be a WESTERN WDB member who did not participate in the development of the technical specifications so that an alternative perspective is present in the review process. One member of the Technical Review Committee will be designated by Committee members as the Technical Review Committee Chair. The Technical Review Committee Chair will have the following responsibilities:

- Be responsible for securing written Non-Disclosure Agreements from the TRC prior to beginning the Proposal technical review process.
- Serve as a point of contact in the event a TRC member has questions or encounters issues relative to the technical review process.
- Submit written requests for clarification to Proposers if the TRC determines that a Proposal contains unclear information or otherwise needs clarification.
- Be responsible for ensuring the timely progress of the technical review, coordinating any consensus meeting(s) or re-evaluation(s), and ensuring that appropriate records of the review are maintained.
- Ensure that each TRC member individually reviews and assesses each Proposer’s Technical Proposal using the overall criteria set forth in the Proposal Technical Review Procedures.
- Be responsible for securing the technical review results at the conclusion of the technical review process and providing the results to the WESTERN WDB staff for aggregation.

III. Conflict of Interest

WESTERN WDB members who have any affiliation with, or any personal or financial connection to, the person or organization submitting proposals that might be construed as creating a conflict of interest are prohibited from participating on the Technical Review Committee. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if

he or she has a real or apparent conflict of interest (Uniform Guidance 200.318 (c)(1)). The general standard for judging whether a conflict of interest situation exists is whether a reasonable person with knowledge of all the relevant facts would have reason to question your impartiality in the matter. Any individuals with a perceived conflict of interest shall not review any submitted proposals, shall not engage in discussions of the procurement process or technical reviews, and shall abstain from voting in all matters regarding the technical review or any part of the procurement process. If an individual perceived to have a conflict of interest inadvertently comes in contact with other proposals or any information regarding the technical reviews of the proposals, the individual shall notify the Technical Review Committee Chair immediately and sign a statement that materials/information were not reviewed and have been disregarded. WESTERN WDB staff are prohibited from participating on the Technical Review Committee and may not provide feedback on any proposals to the Technical Review Committee other than results of a preliminary proposal screening for responsiveness to the RFP. WESTERN WDB staff are allowed to prepare the Technical Review Committee PRIOR to receipt of proposals to ensure that the Committee is knowledgeable of the technical specifications, the review process, and the forms used to document review process and results. The WESTERN WDB staff also may answer technical assistance questions from the TRC regarding WIOA Regulations and Uniform Guidelines.

IV. Non-disclosure and Security

Although all funded proposals are considered public information, until an award is made, all proposals and technical review materials should be considered private. All discussions regarding proposals and the subsequent review of proposals should be limited to scheduled meetings for the purpose of reviewing the technical merit of the proposals. Each person with access to the Proposals, including the Technical Review Committee, Process Oversight Committee, and the WESTERN WDB staff will be required to complete and sign a Non-Disclosure Agreement. Non-disclosure during the review phase helps maintain a fair, objective competition and level playing ground for all proposers and reviewers.

When working with the Technical Proposals and evaluation materials, each member shall keep all of the materials under their direct control and secure from others not associated with the review process. At all other times, the materials shall be locked in a secured area. At the conclusion of the review process, all materials (including work papers) shall be returned to the TRC Chair unless otherwise authorized by the TRC Chair.

All requests made for information pertaining to this process shall be forwarded to the TRC Chair. The TRC Chair will be responsible for all communication outside the TRC.

V. Technical Review Preparation

In order to effectively and objectively evaluate the technical merit of each proposal, PRIOR to receiving proposals, WESTERN WDB staff will meet with the TRC to ensure full understanding of the technical requirements set forth in the RFP as well as the contents of this *Policy* and the *Proposal Technical Review Procedures*. This preparation will be documented and members of the TRC will sign an acknowledgement of understanding.

VI. Technical Review Format

The technical review of proposals will be guided by a clear and accurate description of technical requirements and the factors that will be evaluated during the review process. Prior to receiving proposals, the WESTERN WDB staff will work with the TRC to ensure adequate preparation for the

review. Once proposals are received, the WESTERN WDB staff will use a checklist to do a preliminary screening for responsiveness to the RFP.

Proposals will then be sent to the TRC who will perform the full technical review according to the *Proposal Technical Review Procedures*, using the evaluation form within the specific RFP to guide the review process. The TRC will evaluate proposals based strictly on the criteria set forth in the RFP. The TRC will use a standard score sheet based solely on the criteria set forth in the RFP to review and score proposals individually. Scores will be sent to the WESTERN WDB staff for compilation. The TRC will discuss the compiled scoring and make a decision on the recommendation to the WESTERN WDB. Once final scoring is complete, the TRC Chair will forward the results to the WESTERN WDB staff to be shared with the Executive Committee or Full Board. Any questions that arise during the technical review should be addressed with WESTERN WDB staff or Process Oversight Committee. A detailed report of the technical review results should be made available as soon as the intent to award is established. This report should include comments, but not compromise the identity of the reviewers.

A detailed report of the technical review results should be made available as soon as the intent to award is established. This report should include comments, but not compromise the identity of the reviewers.

VII. Technical Review Process Oversight

A small selection of WESTERN WDB members and WESTERN WDB staff will serve on a Process Oversight Committee. This Committee will observe the process used by the TRC to ensure that both this policy and the *Proposal Technical Review Procedures are being followed*. This Committee will also verify that documentation of the process, including scores and comments, are organized, accurate, and transparent.

PROPOSAL RATING SHEET

Agency Name _____
 (proposal submitter)

Points Possible Points Scored

ORGANIZATIONAL EXPERIENCE, CAPACITY AND PAST PERFORMANCE		
Experience in Managing WIOA Programs or similar programs with outcomes	5	
Fiscal Policies, Procedures and Internal Control/Audit and Financial Strength	5	
Evidence of ability to achieve outcomes of the RFP	5	
TOTAL	15	

COLLABORATION, PARTNERSHIPS AND LEVERAGE		
Evidence of history of successful partnerships and collaboration	5	
Proposer offers considerable value to the workforce system	5	
Evidence of efforts to leverage WIOA funding	5	
TOTAL	15	

PROGRAM DESIGN AND STAFFING		
Effective outreach, intake and orientation processes	5	
Program design responsive to regional labor market demand and supply	5	
Effective case management practices, including using both group and individual approaches	5	
Evidence the program design will accomplish all required elements of program and meet both WIOA performance and WDB expectations	10	
Staffing pattern includes the required positions and is reasonable for the scope of work	8	
Strong approach to meeting the Key Service Delivery Outcomes	7	
Evidence of serving all counties in the service area	5	
Evidence of ability to meet performance goals	5	
TOTAL	50	

BUDGET INFORMATION		
Budget Detail and Narrative are sufficient	5	
Overall Budget is reasonable and cost-effective	7	
Evidence of 35% training expenditure requirement (adult/DW only) or the 20% work experience requirement (youth only)	3	
TOTAL	15	

OVERALL SUITABILITY AND INNOVATION	5	
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GRAND TOTAL _____ / 100

Additional Comments

Rater's Signature _____ Date _____