

**Request for Proposals**

**Workforce Innovations & Opportunity Act (WIOA) Adult & Dislocated Worker**

**Services provided to: Buffalo, Crawford, Jackson, Juneau, La Crosse, Monroe,  
Trempealeau, and Vernon counties**

Issued By	Western Wisconsin Workforce Development Board, Inc. (Western Wisconsin WDB)
Grant Period	July 1, 2023 to June 30, 2024 with option to extend for two (2) additional one (1) year periods.
RFP For:	WIOA Adult and Dislocated Worker services
Estimated Funding	WIOA Adult \$250,000.00 WIOA Dislocated Worker \$275,000.00
Funding Source	US Department of Labor, Wisconsin Department of Workforce Development and the Western Wisconsin Workforce Development Board, Inc. Workforce Innovation and Opportunity Act (WIOA)
Submission Requirement	One electronic submission sent to Jessie Quinn, <a href="mailto:quinnj@westernwdb.org">quinnj@westernwdb.org</a> Due by 4:00 p.m. on April 10, 2023
Direct all questions to	Jessie Quinn, Director of Administration <a href="mailto:quinnj@westernwdb.org">quinnj@westernwdb.org</a>

**Publication:** This RFP is made available to prospective applicants through publication on the Western Wisconsin WDB website ([www.westernwdb.org](http://www.westernwdb.org)) on or about March 10, 2023.

## OVERVIEW

To promote equal access to Workforce Innovation and Opportunity Act funding and active participation among providers in our region, the Western Wisconsin WDB is requesting competitive proposals for WIOA Adult and Dislocated Worker programming. Provision of these services must be offered and made available in cooperation with the Comprehensive Job Center (One-Stop Center) located in La Crosse and throughout the Workforce Development Area (WDA) 9's eight-county area in a manner consistent with the data provided in this solicitation.

The Western Wisconsin 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 Wisconsin 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 Wisconsin WDB reserves the right to fund providers that serve the best interest of the Western Wisconsin WDB based on the evaluation criteria.*

### **The services specified in this RFP will require awarded bidder to become knowledgeable in:**

- 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 <https://www.dwd.wisconsin.gov/wioa/>
- Western Wisconsin Workforce Development Board, Inc. WIOA Plan and policies <http://www.westernwdb.org>
- Uniform Guidance <https://www.ecfr.gov/current/title-2/part-200> and <https://www.ecfr.gov/current/title-20/chapter-V>
- The employer base in the WDA 9, including labor market information and demographics [www.jobcenterofwisconsin.com/wisconomy](http://www.jobcenterofwisconsin.com/wisconomy)
- Training Employment Guidance Letters (TEGL): <https://wdr.doleta.gov/directives/>

## PROPOSAL SOLICITATION PROCESS AND TERMS

### Proposal Due Date

All proposals must be received by 4:00 p.m. on April 10, 2023. Proposals must be emailed to Jessie Quinn, [quinnj@westernwdb.org](mailto:quinnj@westernwdb.org).

It is the responsibility of the proposer to ensure that the proposal is emailed by the due date and time. Emails will be checked at 4:00 p.m. on the due date. Any proposal not in the inbox by that time will be considered non-responsive and will not be evaluated. No late proposals will be accepted.

### Contract Period and Type

The selected contractor(s) will begin on July 1, 2023. The initial contract will be for a twelve (12) month period, July 1, 2023 to June 30, 2024, with an option to extend for two (2) additional one (1) year periods, based on satisfactory evaluation which includes meeting performance measures and other contract deliverables. The Western Wisconsin 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 Wisconsin 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, goals, and performance standards as it deems necessary in the interest of the Western Wisconsin WDB and its programs. Renewals will depend on future funding availability, contractors' satisfactory performance, and other factors such as federal legislative changes.

### Estimated Allocations

The U.S. Department of Labor and the Wisconsin Department of Workforce Development allocate WIOA Title 1 Adult and Dislocated Worker Program funds to the Western Wisconsin WDB (USDOL TEGL 17-15). The funding levels indicated in this solicitation are estimates only, based on current and projected allocations. Actual funding amounts will depend on actual allocations. Budgets and contracts may need to be adjusted once funding levels are confirmed. PLEASE NOTE: The Western Wisconsin WDB's WIOA Plan dictates that 35% of WDA 9's allocation be spent on direct participant costs. Contractors will be required to spend 35% of WIOA 9's funding allocations on direct participant costs. This is in direct reference to State policy 4.16. <https://dwd.wisconsin.gov/wioa/policy/04/04.16.htm>

### 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.

### Schedule for RFP Submission, Review and Awards

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

RFP Release.....March 10, 2023  
Proposals will be available on the Western Wisconsin WDB website at [www.westernwdb.org](http://www.westernwdb.org)

Bidder’s Conference.....	March 15, 2023 @ 10:00
<i>Additional details will be posted on the Western Wisconsin WDB website. Questions that arise during this conference will be answered and posted on the Western Wisconsin WDB website by 4:30 p.m. on March 17, 2023.</i>	
Proposals Due.....	April 10, 2023 by 4:00 p.m.
Technical Committee Review, Evaluation, and Recommendation .....	April 11 to April 21, 2023
Selected Contractor Announced.....	May 1, 2023 by 4:30 p.m.
Contract Starts .....	July 1, 2023

**Proposal Format**

Proposals should be submitted electronically to Jessie Quinn [quinnj@westernwdb.org](mailto:quinnj@westernwdb.org). The subject line should state “RFP Proposal – WIOA Adult & Dislocated Worker”

Proposals must be no smaller than 11-point font, typed, with 1” margins. The page limit is 25 (not including required attachments.)

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.

**Proposal Review and Evaluation Process**

**Proposal Review**

There will be three phases for the Proposal Review and Evaluation Process.

- **Phase I - Preliminary Review for Responsiveness** - Western Wisconsin 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.
  - 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 by the Technical Review Committee. The committee is comprised of Western Wisconsin WDB board members 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. Proposals will be evaluated on the technical merit of the proposals in accordance with the Western Wisconsin WDB Proposal Technical Review Policy. This policy will be posted on the website with the RFP [www.westernwdb.org](http://www.westernwdb.org).

Proposals will be scored based on evaluation criteria outlined in the RFP. These scores will identify the strongest proposals. The Western Wisconsin 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 conducted by Western Wisconsin WDB staff. This site visit will establish, to Western Wisconsin WDB's satisfaction, whether the bidder can conduct and carry out the provisions of the proposed contract. If the results of the site visit indicate, in the opinion of the Western Wisconsin WDB, that the bidder may not be able to fulfill contract expectations, Western Wisconsin WDB reserves the right not to enter into contract with the organization, regardless of Western Wisconsin WDB's approval of the bidder's proposal.

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

- **Phase III** - The Technical Review Committee's recommendation will be presented to the Western Wisconsin WDB Board of Directors or the Western Wisconsin WDB 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.

#### Proposal Evaluation Criteria

The Technical Review Committee will evaluate each submitted proposal using a pre-determined point system dependent on the program being reviewed. The evaluation criteria are available at the end of each program proposal response portion.

#### Procurement Information

##### Leverage of Funding:

WIOA Title I funds are intended to leverage employment and training funds in WDA 9. At least 10% leverage funding is required and must be reported monthly.

##### Non-duplication of Services:

The Western Wisconsin 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 Wisconsin WDB also requires the collaboration and coordination of services with employment and/or training providers in WDA 9.

#### Proposal Conditions

This notice and subsequent proceedings do not commit the Western Wisconsin WDB to enter into a contract with any of the proposal submitting parties. The Western Wisconsin WDB will not pay any costs incurred in the preparation or presentation of proposals nor shall the Western Wisconsin WDB be liable for any costs incurred by the proposal submitter prior to the issuance of a contract. The Western Wisconsin 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 Wisconsin 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 Wisconsin WDB confers no rights upon the proposer. Receipt of proposals shall not, in any manner whatsoever, obligate the Western Wisconsin WDB or any employees thereof. The Western Wisconsin WDB will arrange for the administration of the programs if no acceptable provider is found.

### Withdrawals

A proposer may withdraw a submitted proposal prior to the proposal due date. A written request to withdraw must be submitted electronically to Jessie Quinn, [quinnj@westernwdb.org](mailto:quinnj@westernwdb.org).

### 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 subject to appeal:

- Incomplete or erroneous information
- Withholding of material information
- Falsified information

All prospective applicants, its employees, agents and sub applicants, etc. are prohibited from contacting any Western Wisconsin WDB staff or other persons identified by Western Wisconsin WDB regarding this RFP.

### Appeal

Applicants will receive written notice advising them of Western Wisconsin WDB's 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 and sent through email to: Tammy Brown, Western Wisconsin WDB Co-Chair, [tammy.brown@optum.com](mailto:tammy.brown@optum.com) and Jessie Quinn [quinnj@westernwdb.org](mailto:quinnj@westernwdb.org).

Appeals must be received in email no later than five (5) business days after receiving a written notification of non-award. Those appealing must confirm appeal was received.

The applicant will receive written notice advising as to whether its original appeal has been accepted or rejected within ten (10) calendar days from the appeal date.

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

[john.aasen@co.trempealeau.wi.us](mailto:john.aasen@co.trempealeau.wi.us) and Jessie Quinn, [quinnjm@westernwdb.org](mailto:quinnjm@westernwdb.org).

The CLEO shall review the appeal and render a final decision on awarding of the contract. Decisions by the CLEO will be sent to the applicant and are final. An original or subsequent appeal will not delay the Western Wisconsin WDB from conducting and concluding contract negotiations with the selected applicant(s).

#### Public Record

Applicants are advised that all documents obtained as part of this RFP process, and in the possession of Western Wisconsin 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.

**BACKGROUND AND GENERAL INFORMATION**

**Workforce Innovation and Opportunity Act (WIOA)**

WIOA was signed into law on July 22, 2014. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. Congress passed the Act with a wide bipartisan majority; it is the first legislative reform of the public workforce system since 1998. <https://www.dol.gov/agencies/eta/wioa>

**Western Wisconsin Workforce Development Board, Inc.**

The Western Wisconsin Workforce Development Board (WDB) is a private, non-profit corporation dedicated to promoting innovation and providing quality local workforce development programs and services to businesses and residents in western Wisconsin.

The Western Wisconsin WDB serves businesses and job seekers in 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.



The table below gives information on each county. Labor force and unemployment are as of the end of 2021. The unemployment rate is a snapshot from December 2021, and the population data is from the 2020 census. Careful analysis of this information should inform program design and service delivery strategies. More information can be found at <https://www.jobcenterofwisconsin.com/wisconomy/>

Table 1	Labor Force	Unemployed	Unemployment Rate	Population
Buffalo County	6,371	266	4.2%	13,302
Crawford County	7,518	332	4.4%	16,075
Jackson County	9,616	496	5.2%	21,121
Juneau County	13,532	581	4.3%	26,802
La Crosse County	67,244	2,037	3.0%	120,433
Monroe County	23,783	770	3.2%	46,193
Trempealeau County	15,613	580	3.7%	30,724
Vernon County	15,531	502	3.2%	30,915

Source: WisConomy 2021 data capture



## WIOA ADULT PROGRAM

The WIOA Adult Program participants include unemployed and underemployed individuals over 18 years of age who are seeking employment and may need career and training services. They are primarily low-income adults who have limited skills, lack work experience, or face other barriers to economic success, such as limited English proficiency, offender status, displaced homemaker, homelessness, public assistance recipient, or lack of job readiness skills. Workforce Development Areas receive an annual formula allocation to serve Adult Program participants.

WIOA establishes a priority requirement with respect to funds allocated to a local area for adult employment and training activities. When using WIOA Adult funds to provide individualized career services and training services, staff must give priority to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. Under WIOA, priority must be implemented regardless of the amount of funds available to provide services in the local area. In addition, veterans receive priority of service in all DOL-funded employment programs.

<https://www.dol.gov/agencies/eta/workforce-investment/adult>

Eligibility Requirements are found at: <https://dwd.wisconsin.gov/wioa/policy/08/08.2.htm>

## WIOA DISLOCATED WORKER PROGRAM

The Dislocated Worker program is designed to help workers get back to work as quickly as possible and overcome barriers to employment. When individuals become dislocated workers as a result of job loss, mass layoffs, global trade dynamics, or transitions in economic sectors, the Dislocated Worker program provides services to assist them in re-entering the workforce. <https://www.dol.gov/agencies/eta/workforce-investment/dislocated-workers>

Eligibility Requirements are found at: <https://dwd.wisconsin.gov/wioa/policy/08/08.2.htm#sectionTwo>

### Scope of Services

The WIOA Adult and Dislocated Worker Services Provider will provide and fund career, training, and support services for eligible individuals in accordance with the following:

- State of Wisconsin Department of Workforce Development, Division of Employment and Training (DWD-DET) WIOA policies and procedures <https://dwd.wisconsin.gov/wioa/policy/>
- The Workforce Innovation and Opportunity Act (WIOA) and implementing regulations <https://www.dol.gov/agencies/eta/wioa/guidance>
- Section 188 of WIOA and 29 CFR Part 38, WIOA Nondiscrimination and Equal Opportunity Regulations, and other applicable civil rights laws  
<https://www.congress.gov/113/bills/hr803/BILLS-113hr803enr.pdf>  
<https://www.ecfr.gov/current/title-29/subtitle-A/part-38>
- 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements, and 2 CFR Part 2900, Uniform Administration Requirements for DOL.  
<https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200?toc=1>  
<https://www.ecfr.gov/current/title-2/subtitle-B/chapter-XXIX/part-2900>  
<https://www.ecfr.gov/current/title-20/chapter-V>
- The Workforce Development Area's (WDA) local plan, including the WDB Case Management Policy  
[https://www.westernwdb.org/files/ugd/168c2b\\_b93c5b033013431a81c684be9c9fcc9a.pdf](https://www.westernwdb.org/files/ugd/168c2b_b93c5b033013431a81c684be9c9fcc9a.pdf)  
[https://www.westernwdb.org/files/ugd/168c2b\\_ac5c73ef59994023b42f831c16ae2a38.pdf](https://www.westernwdb.org/files/ugd/168c2b_ac5c73ef59994023b42f831c16ae2a38.pdf)

**Deliverables: Performance and Outcomes**

The proposer must agree to meet and/or exceed:

- Standards for each WIOA performance indicator established through negotiation with the Department of Workforce Development.
- Additional measures may be set by the Western Wisconsin WDB to ensure compliance and continuous improvement.

Program Year 23 (PY23) runs from July 1, 2023 through June 30, 2024. The PY23 DWD negotiated performance standards for WDA 9 are as follows:

	Q2 Unsubsidized Employment	Q4 Unsubsidized Employment	Median Earnings	Credential Attainment Rate	Measurable Skill Gain
Adult	74%	79%	\$7,300	77%	69%
Dislocated Worker	89%	85%	\$8,800	86%	79%

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, and tracking; and must demonstrate the ability to achieve the levels of performance expected.

**Key Service Delivery Outcomes**

The successful proposer is expected to deliver services in a manner aligned with the priorities of the Western Wisconsin WDB. Proposers should articulate in the narrative sections of their proposal how they will reach a more diverse clientele.

DWD-DET requires that local areas provide all services in an equitable and consistent fashion to similarly situated participants. The Western Wisconsin WDB has established written policies and procedures that establish criteria that provide a fair and equitable method for selection among the eligible applicants for all services, as well as a process by which to document fair and equitable determination.

**Western Wisconsin WDB Program Expectations**

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

- 50% of active participants need to have received at least one referral or co-enrollment
- Provide quarterly reports to Western Wisconsin WDB
- Conduct internal participant files reviews
- Success Stories – one per quarter

**Thorough knowledge of local and regional labor supply**

The selected contractor will need a strong understanding of the area’s workforce demographics/labor supply and needs of local employers in order to effectively bridge gaps between labor 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 Wisconsin WDB expects the contractor to stay abreast of fluctuations in both the supply and the market and utilize this information to influence programming.

#### Location/Availability of Services

The selected contractor will offer services to adults and dislocated workers throughout WDA 9. The Western Wisconsin WDB requires the contractor to offer services to eligible individuals in the comprehensive Job Center and throughout the WDA 9 geographical coverage.

WDA 9's comprehensive Job Center is located at:

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

#### One Stop Delivery System

The selected contractor will be a party to the Workforce Development Center's Memorandum of Understanding. Part of the WIOA Adult and Dislocated Worker awarded contract may be used to offer Basic Career Services at the Job Center.

As a One Stop Partner, the selected contractor is required to assume membership on:

- One- Stop Partner (OSP) meetings. The Western Wisconsin 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 duplicated with others offered in the region.
- Business Services Team (BST). 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. The BST is charged with developing the Business Services Plan for the Job Center.

#### Targeted Sectors

WIOA funds used for training in WDA 9 shall mainly be for occupations in industries with a local demand or in demand in another area where the client is willing to relocate. For clients residing within WDA 9, training will be provided for occupations in the targeted/demand industry sectors outlined below. Any exception to training outside these designated sectors requires additional labor market information documentation prior to committing WIOA funds.

- Manufacturing (Sector 31-33)
- Healthcare (Sector 62)
- Information Technology (IT) (Sectors 51 and 54)
- Transportation (Sectors 48 and 49)
- Construction (Sector 23)

To review acceptable targeted industry groupings please refer to the North American Industry Classification System (NAICS) website: <https://www.census.gov/naics/>

#### New Enrollments

There will be participants carried into the PY23 contract. That number is not known at this time. In addition to the participants carried into the new contract, the selected contractor will be expected to enroll new participants in the Adult and Dislocated Worker programs.

### Monitoring

DWD-DET monitors for compliance in the areas of equal opportunity and civil rights, program delivery, and fiscal, as well as performance of local areas to ensure proper systems are not only in place, but that they are being followed and meet the requirements of the law on a yearly basis. In addition, the Western Wisconsin WDB will monitor subrecipient on a regular basis.

## 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.

### Organizational Experience, Capacity and Past Performance - 15 Points

1. Describe your agency's mission, vision, and service expertise and how this proposal relates to your organization's goals and to Western Wisconsin WDB's work.
2. Agency's experience administering public assistance, human services, other social, or workforce development programs.
3. Please describe your agency's experience in detail providing:
  - Name of program (s)
  - Amount of funding for each program listed
  - Description of services for each program listed
  - Geographic area served for each program listed
  - Demographics of service recipients for each program listed
  - Outcomes, including numbers served in a program or fiscal year for each program listed
4. Describe your organization's experience (numbers annually achieved) with participants' job development and job placement that promote self-sufficiency. Describe your organization's strategy and achievements in helping participants retain their jobs.
5. Describe your organization's experience serving diverse customers including individuals with a barrier to employment.
6. Describe how you have collected and used labor market information and business intelligence to forecast participant needs and how you used this information in your program design and service delivery.

### Fiscal Policies, Procedures and Internal Control – 20 Points

1. Describe your management structure to provide supervision to staff. Provide an organizational chart representing staff alignment and accountability.
2. Describe how staff is trained in allowable cost policies and how staff determines a cost is appropriate within the scope of the contract. Please describe the system used to provide supportive services and document payments to or on behalf of participants. How do you document payments and supportive services?
3. 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.

#### Audit and Financial Strengths

- i. 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 financial statement(s) or a balance

sheet(s) and other information that documents the financial status of your agency.

- ii. Do you have any potential claims or liabilities? If so, please explain.
- iii. Please provide a summary of all insurance information and coverage for your agency.

#### Financial and Programmatic Monitoring

- i. Describe your internal review practices. Include the specific content areas that you plan to review and how the results will be documented, utilized, and reported to the Western Wisconsin WDB. If your agency has a Continuous Improvement Plan that outlines how you proactively identify and address areas needing improvement, please provide a copy.
- ii. The Proposing Agency is required to ensure all state and federal funds are used appropriately and effectively to provide services to eligible persons. The agency must ensure systems are in place to provide financial management that subscribes to Uniform Administrative Guidance at 2 CFR200.
- iii. Please discuss your agency's requirements and methods for documentation of expenses. Describe your process for determining that costs are allowable, reasonable, necessary, and appropriately allocated to meet all federal and state requirements.
- iv. Describe how your agency will ensure that WIOA funds will be spent only on the WIOA Adult and Dislocated Worker activities. Please note that all contractors that receive funding other than WIOA must have an indirect cost rate agreement OR choose the 10% de minimis rate. Please provide your indirect cost agreement or choice to use the 10% de minimis rate and cost allocation plan.
- v. Discuss how staff is/or will be trained on WIOA allowable cost policies and how staff determines that a cost is appropriate within the scope of the contract.

#### Collaboration, Partnerships and Leverage – 15 Points

1. Describe your organizational experience in partnering with other organizations. Describe the services provided, outcomes, and key successful strategies.
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. Describe your experience with leveraging partner programs and funding to eliminate duplication and reduce cost inefficiencies.
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 your organization's experience when dealing with leveraged funding.

#### Program Design – 20 points

1. Describe your organization's ability to provide quality services in a virtual hybrid setting. Include strategies to serve individuals who may have barriers to technology or transportation.

2. 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 DWD is accurate, verified and timely.
3. Describe how the agency intends to provide Career Services.
4. Describe your proposed or current process for determining participant eligibility for programs.
5. Describe your proposed intake and orientation process. Describe how you would assess the employment/training/support service needs of each individual participant, including the assessment instruments you will use.
6. Describe how your program design is responsive to the regional labor market and available labor supply, specifically using data to support your program design including the sources used to determine the data driven response.
7. What budgeting methods will be used to ensure that contract-required participant funds are spent?
8. Describe how you would ensure the majority of training occurs within the identified demand sectors and meets the local employers' needs.
9. Describe how you will incorporate Career Pathways, and Credit for Prior Learning into your program service delivery.
10. Describe how you will increase awareness and access to WIOA services.
11. Describe how you will improve the connection between businesses and job seekers.
12. 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. Please include any partners you are already working with to identify or resolve specific barriers.
13. Describe how you will expand access to services for the offender population. What agencies or programs do you anticipate attempting to collaborate with to better meet the needs of the population? What proactive steps would you take to engage this population?
14. Describe your plan for identifying minority populations for enrollment and collaboration.
15. Describe your experience with participant recruitment, including essential elements of your approach and how effective your previous recruitment strategies have been.
16. Describe what you envision as essential considerations and elements of a quality employment plan.
17. What is your process that will be used for participant goal setting, and how you will ensure that services provided serve to advance a participant's goal attainment?
18. What other roles or functions do you envision for Career Planners in order to maximize impacts and outcomes?

### Staffing – 15 points

1. Explain the composition of proposed staff, including position title(s) and number of staff proposed for each position. Also include proposed primary location(s) of staff and how Careers Planners will be distributed throughout WDA 9.
2. Describe flexibility 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.
3. Describe your plan to ensure staff are well-trained and ready to deliver WIOA services. Include topics you feel are critical to support service delivery and outcomes.
4. Describe what you envision as necessary qualifications, characteristics, or experience for Career Planners. Be specific and use examples to support your response.
5. Describe how you will establish programmatic goals, accomplishments, and evaluation of Career Planners.
6. 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 each position is included in your staffing pattern and how the position contributes to program outcomes.

### Budget and Budget Narrative — 15 points

1. Please complete the forms below along with including your latest audit information and any additional funding sources. Please include any evaluations from those additional funding sources.
2. Provide a budget narrative that outlines how each cost was calculated and the justification for each.

### Required Forms

Form A	Cover Sheet
Form B	WIOA Adult Budget
Form C	WIOA Adult Staffing Pattern
Form D	WIOA Dislocated Worker Budget
Form E	WIOA Dislocated Worker Staffing Pattern
Form F	Assurances
Form G	WIOA Explanation Form
Form H	Equal Opportunity Form
Form I	Statement of Non-Collusion
Form J	Provisions and Disclaimers



Proposal Evaluation Criteria

Section	Points Available
Organizational Experience, Capacity & Past Performance	15 Points
Fiscal Policies & Internal Control	20 Points
Collaboration, Partnerships & Leverage	15 Points
Program Design	20 Points
Staffing Section	15 Points
Budget Information	15 Points
Total Points	100 Points

Proposers must score a minimum of 75 points to be considered for a contract.