

This section contains instructions for:

- **Program Narrative**
- **Program Management Narrative**
- **Financial System Criteria**
- **Personnel Policies**
- **Insurance Requirements**

PROGRAM NARRATIVE

Responses to the areas below must be made in accordance with the specifics listed in the Master Guidelines and applicable sections of this RFP. Use the previously described question and answer format that includes required one-inch margins, minimum 12 point font and maximum of 15 single spaced pages. **Absolutely no cost information may be mentioned in any section except in the sealed line item budget.**

A. Previous Experience

1. Please describe your organization's mission and any previous or current experience serving job seekers in a service integrated setting.
2. Describe your WIOA and/or related experience and capability to serve customers from varied backgrounds such as special populations including veterans and related eligible persons, low income individuals, displaced homemakers, women and minorities, older individuals, individuals with low literacy levels, individuals with disabilities, those with limited English proficiency, recipients of public assistance, single parents, youth, ex-offenders, etc.

In addition, describe your experience and capability to serve customers with few or no barriers to employment, who may have advanced degrees, and who may have significant high-level employment histories.

3. Explain what areas of your program have been most successful in helping the various groups to reach their employment goals.

B. Coordination of WIOA Title I Program Activities with Local Business, Industry, and Labor Organizations.

1. Describe how the Title I activities being proposed will be coordinated with business, industry, apprenticeship and pre-apprenticeship, and labor organizations in the area. A description of innovative programming/best practices and/or partnerships that could be replicated in this region.
2. How will your proposed activities meet the needs of local employers?

C. Community Outreach and Capacity of the Proposer to Collaborate in the Provision of Services.

1. What is your experience and capacity to create collaborations with other community agencies to provide services to customers beyond the scope of the PA CareerLink®?
2. Describe how you will coordinate outreach efforts with PA CareerLink® partners and other agencies including offsite staffing.

D. Staffing

Adequate staffing and a strong infrastructure are critical to the delivery of services. Describe your staffing plans including the following:

1. Specifically describe your anticipated direct customer and support staff levels including:
 - a. Explain the composition of staff including the number of staff that will initially be employed to provide direct customer services such as case managers, job search and job placement staff;
 - b. Explain your support staff configuration and general duties;
 - c. Explain your staffing configuration in support of the PA CareerLink®.
2. Specifically describe your anticipated supervisory staff structure including:
 - a. Staff levels needed for effective supervisory and service delivery functions, including your proposed lines of authority and responsibility;
 - b. Proposed supervisory structure and relevant qualifications of key staff to perform the WIOA services including technical, educational, and work background;
 - c. Describe your management philosophy and the general duties of your supervisory and lead staff;
 - d. Identify the WIOA Lead (or the position title) to serve as a liaison between the WIOA Title I Operator and SCPa Works. Provide a job description of the WIOA Lead. Include a resume if applicable, or explain how the position will be filled;
 - e. Provide job descriptions and qualifications for each position that will be funded including the minimum qualifications for all staff. If you currently have staff that you will use in the WIOA program, please enclose a resume for each and indicate which position that staff will be assigned.
3. Describe your plan to maintain an appropriate percentage of direct services staff who are bilingual in Spanish/English and/or able to accommodate persons with limited English language skills.

4. Describe how you will be flexible with staffing levels with the ability to shift staff responsibilities and hours in order to ensure effective coverage.
5. Explain what staff training and development will be made available.
6. Outline the experience, education and background requirements of staff to substantiate the quality and integrity of the activities you will offer.
7. Describe your staff compensation plan. Be specific regarding compensation for each of the proposed level of staff (not individuals) and include information regarding performance-based pay increases, scheduled cost of living adjustments, etc.
8. Attach an organizational chart of the proposed structure.

E. Integration of Services into the PA CareerLink®

As stated earlier, in a successful PA CareerLink® there can be no stand-alone programs. The partners are interdependent upon each other to provide quality programs and services that benefit the customers they serve. Describe how WIOA Title I services will be integrated into the PA CareerLink® System, including the following specific information:

1. Plans to coordinate and work interdependently with other organizations in the PA CareerLink® to ensure the employment and training needs of customers are being met and job seekers are qualified to join the workforce.
2. Proposed special arrangements between the Title I Operator and other organizations or employers designed for the benefit of job seekers including Title 1 services outside the local PA CareerLink®.
3. Plans to coordinate and assimilate all functions including specific planned activities in support of the PA CareerLink®.
4. Describe the workshops or related activities that will be offered as part of career services in the PA CareerLink®.

F. Program Design and Service Delivery

1. Describe the experience a customer will have according to your plan of service, beginning at the time of entry into the PA CareerLink® through post-employment services. Be as specific as possible in describing flow, understanding that individuals needs vary.

Include:

- a. proposed career services that will be provided. Be specific when describing all the WIOA and integrated activities to be performed.

- b. a description of how you will ensure that customers are engaged in a continuum of activities that lead to obtaining and retaining employment.
 - c. a description of your case management and follow-up activities in support of the proposed services.
 - d. a description of your services to special populations (see Narrative A – 2).
 2. Describe your plan to utilize. If additional assessment tools will be used, please describe.
 3. Describe your plans to provide quality career counseling, case management and follow-up with customers.
 4. Describe how you will address the issue of flexibility including non-traditional hours, activities, and locations including some evening activities of the PA CareerLink® designed to meet the needs of customers.
 5. Describe your job search assistance activities, including:
 - a. a description of a successful transition into unsubsidized employment, describing specific planned activities that increase the probability of employment. Describe the methods used to reinforce soft skills not directly related to technical skills, but necessary for obtaining and maintaining unsubsidized employment. In addition, describe in detail the services to be provided to each customer upon successful completion of a training program.
 - b. Describe your plans to operate and integrate the services of the successful Job Search Center program. Be as specific as possible.
 6. Describe how the Business Services Team will engage local employers and increase employer engagement.
 7. Describe your plan on addressing services to individuals with barriers.

G. Job Placement Assistance

1. Describe the business linkages in place to ensure unsubsidized job placement and retention.
2. Describe the linkages and support of the Business Services Team.

H. Tracking, Performance Measures and Monitoring

1. Describe the process for accurate and timely data entry of customer information including case notes into CWDS as well as the in-house data management system. Who will be charged with this task? What is your on-site and off-site (centralized) capacity?

2. To ensure program compliance and performance, an effective management system must have a process that verifies progress in attaining established performance objectives. Describe the system you used to monitor and verify that performance measures will be met.
3. Describe the following relative to performance measurements:
 - a. Demonstrated commitment to achieve and surpass all mandated performance measures;
 - b. Identification of additional performance indicators to measure WIOA program impacts and evaluate success;
 - c. Evaluation methods for tracking and ensuring that all required performance measures are met or exceeded;
 - d. Internal systems to identify operational problems, and take appropriate corrective action to improve performance issues as necessary. Proposers must include with this proposal a description of their continuous improvement process.
4. Contractors are responsible to closely and formally monitor subcontractors. Please describe your monitoring plan.
5. Describe your plan and commitment that enables WDB staff to maintain regular, ongoing personal contact and communication with Title I Operator staff and, as needed, with customers at all locations.

I. Transition Planning

1. Describe your transition plan by addressing the following:
 - a. Commitment to accomplishing a thorough and smooth transition that includes the interview and consideration of existing Contractor staff that may be displaced as a result of this RFP;
 - a. Plan for working with the WDB and PA CareerLink® to notify customers, providers, and other community organizations about changes if necessary;
 - c. Plan for providing uninterrupted WIOA services and activities to customers.
2. Please describe your transition timeline.
3. Please add any additional information you feel would be helpful in describing your program activities.

PROGRAM MANAGEMENT NARRATIVE

Use the previously described format that includes required one-inch margins and minimum 12 point font and maximum of 4 single spaced pages. **Absolutely no cost information may be mentioned in any section except in the sealed line item budget.**

A. Organizational and Financial Ability and Experience

Provide a complete and detailed description of the following items:

1. Type of organization and what the key strengths of the agency are, i.e. capacity, capability, and experience for operating state and federally funded employment and training programs.
2. Experience of the organization in providing WIOA and/or related training programs and/or program services/activities as it relates to services you plan to provide under your proposed contract.
3. Organization's supervisory capacity to manage contractual agreements and communicate effectively with SCPa Works.
4. Capacity to manage federal, state and local funds. The organization must explain how such funds will be administered in accordance with their current operational financial management system. Identify key staff by name and outline qualifications. Describe how you will ensure the line item contractual limits are not exceeded.
5. The method used to monitor actual expenditures to budget amounts by cost category and line item expense.
6. Procedures to ensure the accounting records are supported by source documentation for each transaction.
7. Your system of internal control to ensure no fraud or abuse takes place.

B. Organizational Administration

Proposer must have adequate personnel capabilities necessary to implement the goals and objectives of the program and to ensure compliance with ensuing contract. The selected contractor will be required to assume full responsibility, including local area performance and all risks and hazards for all WIOA funding streams, services and activities identified in this RFP.

1. Provide an overall organizational chart showing your organization's management and staffing structure that demonstrates how each facility and service area will be served. Also include how your organization will communicate with SCPa Works.

2. Describe how all off-site positions funded by the contract contribute directly to the operation of SCPa Works WIOA Title I Operator functions.
3. Identify fiscal and management staff by including a thorough description of their demonstrated technical competence; skills in management and administration, and professional experience within your organization to accomplish the proposed WIOA program training, services and activities.
4. Identify fiscal and management staff positions that your organization intends to hire if awarded this contract. Include a thorough description of the qualifications and demonstrated skills that will be required of the staff filling those positions.

C. Reporting Requirements Capability

As outlined in the RFP, the selected contractor must demonstrate the ability to be compliant with WIOA program reporting and record-keeping, the capability to generate accurate and timely information, and submit periodic fiscal and programmatic reports. The selected contractor will be required to provide various financial and performance reports to SCPa Works on a monthly basis in such detail and on such forms as required by SCPa Works.

1. Describe in detail your Information Technology (IT) capacity to administer reporting requirements, data reconciliation and ability to input data accurately into the CWDS and in-house data systems as outlined in this RFP.

FINANCIAL SYSTEM CRITERIA

The following information must be provided in addition to the Project Line Item Budget.

1. Complete the information below for determination of the need of the proposing organization to undergo either an organization-wide or program-specific audit. Indicate \$0 if no federal funds have been received or anticipated to be expended in the future. If the proposing organization's federal funding levels fall within OMB circular guidelines necessitating an audit, it is the responsibility of the proposing entity to have one performed in accordance with the circulars.

Total federal funds your organization received during the period July 1, 2015 - June 30, 2016

Total federal funds your organization received or expected to be received during the period July 1, 2016 - June 30, 2017

Total federal funds, excluding this proposal, your organization plans to expend during the period July 1, 2017 - June 30, 2018

2. Describe the cost allocation plan and process used by the organization to distribute both direct and/or indirect shared costs to the funding source that benefits from incurred expenditures. Identify the allocation base or method of documentation used in this process.

Attaching a copy of your written Cost Allocation Plan (CAP) that is audit compliant is acceptable.

Please include an auditor's opinion of the equitableness of the CAP. Please indicate if you are attaching a CAP.

3. Attach the following:
 - a. List of the organization's Board of Directors (if applicable).
 - b. A copy of bonding agreements. All persons authorized to receive and/or deposit, and/or issue financial documents or instruments of payment, of WIOA and other funds received from the Workforce Development Board (WDB) must be bonded for the higher of \$100,000 or an amount equal to the highest check during the immediately preceding grant year or planned for the present year.
 - c. A certification letter signed by the legal authorized signatory of the proposing organization that the financial system and its management will account for and control the use of funding sources financing this proposal in accordance with Generally Accepted Accounting Principles, Office of Management and Budget circulars, and all other rules and regulations governing these funds. This must include a statement to the effect that the organization understands the audit and audit resolution requirements as detailed in the OMB circulars. The letter should provide assurances that expenditures will be competitive, be cost efficient, and have direct benefit to the program.
 - d. Describe current financial management credentials & experience; plan for managing, budgeting, and billing.
 - e. Demonstrate financial viability with a statement of cash on hand and/or a line of credit with a financial institution.
 - f. A copy of the most recent comprehensive audit report, preferably prepared by an independent Certified Public Accounting firm. Please include copies of the Management Letter and Corrective Action Plan if issued with the most recent audit.
 - g. Please be able to provide a copy of the Cost Allocation Plan opinion from your cognizant federal agency if requested.

PERSONNEL POLICIES

Proposers must attach a document explaining their Personnel Policies concerning the following (please do not attach the entire document):

- Description of Proposer's participant grievance process;
- Description of Proposer's efforts to assure nondiscrimination in service provision and staff hiring decisions;
- Description of the measures taken to ensure the confidentiality of customer information and HIPAA regulations and ramification for policy violation. Attach a copy of your confidentiality policy;
- Explanation of how customers are informed of the grievance policy;
- Description of Proposer's Sexual Harassment Policy and ramifications for violations.

In addition to the above please attach the following:

- Copy of Proposer's Equal Opportunity Policy Statement and complaint procedure;
- Copy of Proposer's Grievance Policy.

INSURANCE REQUIREMENTS

Proposer must include a statement that Proof of Required insurance (see Contract Award in Section I) will be issued upon selection.