

Region 2 Workforce Investment Board Policy Letter #10

Subject: REQUEST FOR PROPOSAL PROCESS and GUIDELINES
YOUTH AND NON YOUTH

Effective Date: Prior Board Approval June 15, 2017

Revised 7.11.18 for Board Approval 7.20.18

1. **Authority**

The Workforce Investment Board maintains monitoring and oversight responsibilities of all WIB activities but it delegates to the responsible committees and WIB staff the responsibility to create the necessary Request for Proposals (RFPs) grants and awards to be compliant with the Workforce Investment Opportunity Act of 2014. The Executive Director, with approval of the LEO/ Executive Committee, will make all RFP and contract awards. The WIB chairperson and Executive Director will sign all contracts on behalf of the WIB.

2. **Bidding Criteria**

The responsible committee will determine what services it wants, what type of provider is needed, what cost analysis is required, and what type of objectives and performance criteria must be met for the whole region or specific counties within the Region 2 Workforce Investment System.

3. **RFP Format**

The responsible committee/staff will provide the technical specifications on proposed procurements to the Executive Director with the criteria to be transmitted to the Executive Committee for approval. The criteria should be kept general enough to allow opportunity to consider other quality provider options for providing needed items or services but also are detailed enough to allow for fair comparison, and are adequate for what is being proposed for acquisition.

4. **Advertising**

The Executive Committee will review the RFP request form prepared by staff and modify or approve the form for advertising. The Executive Director and/or staff will submit a public notice to all Region 2 county newspapers and contact the statewide service provider network and the State Register with the following information:

- a. existence of the RFP with directions how to receive a copy
- b. requirement to be at the bidders conference to be a qualified bidder
- c. location, date, and time of bidders conference (no sooner than one week after advertisement)
- d. Contain statement of the percentage of total cost of the program or project which will be financed with federal money.
- e. The dollar amount of federal funds for the project or program
- f. Percentage and dollar amount of the total cost of the project or program that will be financed by non-governmental sources.

The Executive Director and/or staff will provide technical assistance at the bidders conference. Technical assistance requests will not be honored after the bidder conference.

5. RFP Review Sub-Committee

RFPs from qualified bidders received by the deadline established will be turned over to a RFP Review Sub-Committee consisting of staff of Region 2 WIB to review content, required elements and fiscal data according to established evaluation criteria.

Points will be assigned for each completed section on an Evaluation Summary Sheet and a recommendation will be made to the Evaluation Team.

6. Evaluation Team

The proposals will be rated next by an Evaluation Team consisting of the WIB Executive Director, who presents the staff sub-committee recommendations, the WIB Chairperson, the appropriate Council Chair (optional); the Chairperson or appointed representative of the Local Elected Official Board and another appointed representative of the WIB Executive Committee; and Youth Council Member for Youth Programs.

The duty of the Evaluation Team will be to rate the overall acceptability of each proposal, which may include site visits and / or oral presentations by the bidders, where appropriate. As part of the pre-award survey and evaluation process, the Evaluation Team may request performance data from other jurisdictions and funding sources regarding the bidder's ability to meet planned goals and funding requirements. Contracts will only be awarded to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy record of past performance and technical resources including personnel qualifications. The results of this review will be forwarded as a recommendation along with the all RFP Sub-committee summary sheets of all RFPs received to a joint meeting of the LEO Board and the WIB Executive Committee. The Evaluation Team will make a recommendation based on what is in the best interest of the Region 2 WIB and conforms to the standards in DOL regulations set forth in CFR200Sec.200.317-200.314.

7. Selection and Negotiations with Bidders

The RFPs, with the RFP Sub-committee summary sheets with point total broken down by section, and the recommendation of the Evaluation Team will then be presented to a joint meeting of the LEO Board and the Executive Committee for final approval. The LEO Board and Executive Committee will consider the Evaluation Team recommendation along with other factors; such as the service providers judged ability to perform and deliver the performance promised in the RFP.

If no proposals are submitted, the Executive Committee can use Sole Source Procurement. In case of one proposal the Executive Director would negotiate with that service provider in order to award the contract.

The Executive Director/ staff will begin negotiations with the successful service provider to come to an agreement on administration, performance and cost details.

RFP's will normally be awarded for the balance of the program year up to June 30, with a one or two-year renewal option to align RFP contracts with our program year, July through June.

8. Youth Eligibility is defined in Policy # 12, Adult and Dislocated are defined in Policy #5.
9. Out of School Youth (OSY) age 18-24 maybe eligible for concurrent funding from both Adult and OSY per 681.430 of WIOA Act as long as funding stream is tracked.
10. Youth may be served after age 24 if he enrolled at or before age 24.
11. WIOA permits the flexibility of funding ITA's with OSY funds age 16-24.
12. Youth follow-up services may include the following program elements:
 - A. Support Services
 - B. Adult mentoring
 - C. Financial Literacy Education
 - D. Services that provide labor market and employment information
 - E. Activities that help youth prepare for and transition to postsecondary education activities and training which includes in Region 2 Transitional employment
 - F. 20% of Youth funding must be spent on work experience. Local area administrative costs are exempt from this figure-681.590.

80% Expenditure Rule- A grant or contract must have spent or will be able to spend 80% of the funding awarded by the end of the ninth month of grant or award if not funding may be recaptured from award or contract to be funded on another project.