



*Serving the counties of:
Boone, Cabell, Lincoln, Logan, Mingo, Putnam, and Wayne*

**REQUEST FOR PROPOSAL FOR
WORKFORCE INNOVATION & OPPORTUNITY ACT:
Certified Public Accountant, PLLC**

Release Date: [5/04/2026]

Proposals Due: [6/18/2026]

Funding Period: July 1, 2026 – June 30, 2027

Renewal Opportunities: July 1, 2027 – June 30, 2028

July 1, 2028 – June 30, 2029

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Section I: Program Description & Background

1. Purpose of RFP

The South Western West Virginia Region 2 Workforce Development Board is seeking proposals from qualified licensed Certified Public Account PLLC applicants that have experience not only in consulting services but proficient knowledge and experience of accounting computer software such as QuickBooks and MS office products. Ten years total professional experience is preferred, including WIOA (Workforce Innovation Opportunity Act) accounting functions.

Applicants will provide oversight, analysis and recommendations for monthly internal financial statements prepared by the company. Applicants will provide analysis and recommendations on policies and procedures, assist with cash flow and budgeting models for various purposes and assist with new projects as they develop upon request.

More information about the R2WDB, WorkForce West Virginia, and U.S. Department of Labor can be located on their respective websites:

- South Western West Virginia Region 2 WDB: <https://www.wvregion2.org/>
- WorkForce West Virginia: <https://workforcewv.org/>
- U.S. Department of Labor (WIOA): <https://www.doleta.gov/wioa/>

2. The Workforce Innovation and Opportunity Act

The South Western West Virginia Region 2 Workforce Development Board's (R2WDB) services and programs are funded through the Workforce Innovation and Opportunity Act of 2014 (WIOA). Therefore, each Proposer must be familiar with state and federal requirements of this program and the R2WDB's local plan.

WIOA provides workforce development activities through statewide and local workforce development systems. These systems should increase employment, retention, earnings, and occupational skill attainment by participants and, as a result, improve the quality of the workforce.

3. Region 2 Workforce Development Board

The R2WDB is a 501(c)(3) non-profit organization designated as the administrative entity, organizer, and grant recipient of Workforce Innovation and Opportunity Act (WIOA) 2014 funds. The R2WDB encompasses a seven (7) county area in West Virginia consisting of the following counties: Boone, Cabell, Lincoln, Logan, Mingo, Putnam, and Wayne.

Mission: The R2WDB will forecast, fulfill, and monitor the education and skill needs of employers and individuals in order to meet the needs of both sets of customers. We will:

- Reduce or eliminate the barriers to economic development and barriers that separate skilled and unskilled workers.
- Increase the efficiency and effectiveness of customer links to resources.
- Monitor and provide incentives to system participants to encourage continuous improvements and to meet/exceed state performance goals.
- Coordinate and integrate training, education, and economic development systems to meet community and employment needs.

Vision: A skilled workforce that enables our economy to expand and individuals to be self-sufficient through an integrated system.

4. Role of the Certified Public Accountant, PLLC

The Certified Public Accountant, PLLC will assist Fiscal staff and support Executive Director in carrying out his/her responsibilities in the financial policy including; system building, member communications, administration and compliance. Financial experience required in Workforce Innovation Opportunity Act.

Additional responsibilities of the Certified Public Accountant, PLLC:

- A. Provide fiscal oversight to ensure compliance with WIOA Uniform Guidance (2CFR PART 200) on and West Virginia Workforce policies and procedures.
- B. Assist and support Director in managing and monitoring all WIOA funding streams (Adult, Dislocated Worker, Youth, and Administrative funds) to ensure proper allocation and expenditure.
- C. Provide the Director with ongoing analysis of Budget performance, funding utilization and potential fiscal risks and concerns.
- D. Assist with development and oversight of the local area budget ensuring alignment with local plan and strategic priorities.
- E. Provide technical assistance and training of staff and subrecipients on fiscal policies, allowed costs, and compliance expectations.
- F. Support policy development and updates to ensure alignment with changes in Federal and State WIOA guidance.
- G. Collaborate with Program staff to ensure fiscal accountability aligns with program performance and outcomes.
- H. Review and assist Fiscal staff on financial reports, general ledger activity and grant expenditures to ensure accuracy, allowability, allocability, and reasonable costs.

5. Eligible Respondents

Proposer(s) may be a Licensed Certified Public Accountant (CPA) with experience in consulting services and proficient knowledge and experience of accounting computer software such as QuickBooks and MS Office products. Preference given to CPAs with 10+ years of total professional experience including WIOA accounting functions.

No entity may compete for funds if (1) the entity has been debarred or suspended or otherwise determined to be ineligible to receive federal funds by an action of any governmental agency; (2) the entity's previous contracts with the R2WDB have been terminated for cause; (3) the entity has not complied with an official order to repay disallowed costs incurred during its conduct of programs or services.

The R2WDB will afford full opportunity for minority and women-owned business enterprises to submit a show of interest in response to the invitation and will not discriminate against any firm or individual on the grounds or race, creed, color, sex, age, handicap status or national origin in the contract award.

Additional Requirements: The State and local boards shall ensure that in carrying out activities under this title:

1. Disclose any potential conflicts of interest arising from the relationships of the Contractor with training service providers or other service providers.

2. Comply with Federal regulation and procurement policies, relating to the calculation and use of profits.
3. Respondents must comply with Section 504 of the Rehabilitation Act of 1973, the Federal Drug-Free Workplace Act of 1988, and the Americans with Disabilities Act to be eligible.

6. Project Timeline & Funding

The table below provides a timeline of activities for this procurement.

Activity	Date
RFP Release	May 04, 2026
Bidder Conference & Questions -by telephone (see page 12)	May 22, 2026 1:00PM
Proposal Deadline (email only)	June 8, 2026 5:00PM
Interviews (if necessary)	June 8-12, 2026
Recommendation to R2WIB Full Board	June 15, 2026
Contractual Start Date	July 1, 2026

Please include in the mandatory budget form service fee rates for the services outlined in the duties and responsibilities on page 4. In addition to the required standard billing rates please include any out-of-pocket expenses. **The annual contract may be renewable up to two (2) times.**

Section 2: Scope of Work

Proposals should be developed and organized as outlined below. Interested bidders should respond to each section's requirement in its entirety. For example:

Experience and Capacity

Experience & Capacity (10 points)

1. Briefly describe your organization's history, including the number of years in operation, past services provided, and customers and geographies served.
2. Explain how your organization's vision, mission, and objectives align with this funding opportunity.
3. Describe your organization's governance and management structure, vision and mission, objectives, and major programs and/or services.
4. Describe your organization's financial and administrative experience and capabilities managing and accounting for multiple federal, state, and local funding sources and conducting self-monitoring for performance and compliance. Bidders must be in accordance with Generally Accepted Accounting Principles (GAAP).
5. If submitting a response as a consortium, explain your rationale for the R2WDB model and how collaboration will be managed. Identify the lead consortium partner and describe the roles and responsibilities of each partner. Attach a detailed MOU between all consortium partners.
6. If subcontractors are included in the proposal, explain your rationale for their inclusion and describe the roles and responsibilities of each subcontractor. Attach a detailed MOU with each subcontractor included in the proposal.

Qualifications (15 points)

7. Describe your organization's project management experience within the past three (3) years. Describe the nature and scope of the work performed and quantify the scale of work in terms of contract amount and number of personnel and/or participating entities.
8. Describe your organization's relationship management experience within the past (3) years, including experience with:
 - a. Developing and facilitating complex partner relationships
 - b. Facilitating collaboration across multiple partners
 - c. Negotiating
 - d. Resolving conflicts and mediating between partners.
9. Describe your experience developing and implementing continuous improvement processes within the past three (3) years.
 - a. Describe the nature and scope of the processes implemented and quantify the work in terms of contract amount, complexity, and scale of processes, and/or other relevant parameters. Describe methodologies and technologies used.
10. Describe your organization's relevant industry experience within the past three (3) years, including experience with:
 - a. WIOA funding/grant management (financial components)
 - b. QuickBooks/Microsoft Office skills
 - c. Analysis of finances for grant funding
11. Attach three (3) letters of reference that attest to your organization's experience.

Staffing Plan (15 points)

12. Provide a detailed explanation of the role the CPA will play in executing the Scope of Work.
13. Provide the name and title of the lead individual staff person who will perform the services of the Certified Public Accountant. Describe the relevant education and training, professional experience, skills, and other characteristics that qualify them to perform the proposed role.
 - a. Attach a current resume (with up-to-date information on current title and functions) for each proposed staff.

Project Design (35 points)

14. Describe the strategies, methods, and specific activities your organization will undertake to successfully perform the functions and responsibilities of the role of Certified Public Accountant.

Budget (25 points)

15. Provide a budget narrative that justifies each proposed expense included on the Budget Form. Fully explain the proposed programmatic costs. For example, if funding is budgeted for support services, describe types of assistance that might be provided with the funds.
16. Describe how the proposing agency will financially support the costs of doing business until an invoice can be submitted and paid by the R2WDB.
17. State what method of payment will be requested, either fixed unit price or cost reimbursement with a demonstrated performance basis. If a fixed unit price contract is proposed, describe in detail the proposed outcome payment points and the documentation that will be submitted to provide attainment of the outcome. If a cost reimbursement with a demonstrated

performance holdback contract is proposed, provide the proposed percentage of the total cost that will be withheld (maximum is 50%). Describe the measurable performance outcomes to which the organization will tie payment and the documentation that will be submitted to provide attainment of the outcome.

Section 3: Submission & Evaluation

1. Bidders Conference & Questions

All questions that interested parties may have can be directed to Melissa A Bias at: mbias@wvregion2.org
Questions will be addressed at the bidder's conference via phone conference on 5/22/2026 at 1:00PM EST, please call (267) 930-4000 and enter ID # 852738266

An entity's failure to submit a complete proposal or to respond in whole to RFP requirements will result in the proposal being deemed non-responsive and thus ineligible for funding. A proposal may also be deemed "non-responsive" if the submitted price is found to be excessive or inadequate as measured by criteria stated in the RFP, or the proposal is clearly not within the scope of the project described and required in the RFP. R2WDB reserves the right to cancel this procurement at any time, for any reason.

2. Proposal Instructions

The Scope of Work should be completed entirely, should not exceed 15 pages, and be typed in 12-point font, single-spaced, 1" margins on all sides, page numbers, and table of contents. **Once completed, interested parties must submit their proposal electronically to Melissa A. Bias at mbias@wvregion2.org on or before 6/8/2026 5:00PM EST.** Please have your proposal organized in the following manner for each component:

- Attachment A: Cover Page
- Attachment B: Conflict of Interest Form
- Attachment C: Budget Form & Narrative
- Attachment D: Reference Form and Letters
- Two (2) Years of Audited Financial History
- Documentation of registration for private, for-profit, or non-profit organizations (if applicable)
- Proposal (scope of work)
- Staff Resumes
- Job Descriptions for Proposed Staff Positions Not Yet Hired (if applicable)
- Additional Attachments as necessary
 - o If submitting as consortium, attach a detailed MOU among all consortium partners
 - o If subcontractors are included in your proposal, attach a detailed MOU with each subcontractor included in your proposal

Bids that fail to follow this order will risk losing points in their overall score.

3. Evaluation and Award

Proposals will be evaluated by South Western West Virginia Region 2 Workforce Development Board to ensure each submission meets all criteria outlined in this RFP. The Region 2 WDB Board members will develop and use a scoring matrix to evaluate each proposal. Each section of the scoring matrix is worth the following number of points:

Section	Points
Experience & Capacity	10
Qualifications	15
Staffing Plan	15
Project Design	35
Budget	25
TOTAL	100

All items that are mandatory (e.g., inclusion of attachments, financials, etc.) are considered pass/fail

Notice of Award

All respondents will be notified by email as to their award status. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to this effect to Mr. Andy Skidmore, Board Chair, at askidmore@hurricanewv.com. Unsuccessful respondents are encouraged to re-apply in subsequent funding cycles.

4. Appeals Process

Any disagreements resulting from this procurement process must be addressed in the same manner outlined in the Board's Grievance and Complaint Policy, located at:

[https://www.wvregion2.org/assets/images/pdfs/combinepdf_\(4\).pdf](https://www.wvregion2.org/assets/images/pdfs/combinepdf_(4).pdf).

5. Fiscal Review

R2WDB will conduct a fiscal review of all qualified proposals. We will review proposal budgets, agency audits, and responses to questions related to fiscal operations. The R2WDB reserves the right to review and request further information regarding the respondent's financial situation, if not sufficiently outlined in the submitted audit(s). The R2WDB reserves the right to assess the risk posed by any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event that might affect an organization's ability to operate the requested program.

6. Past Program Performance

Region 2WDB may review a respondent's performance on any previous and/or existing grant agreement(s) as well as check references submitted from other grantors. Achievement of grant agreement outcomes, along with compliance with programmatic and fiscal guidelines and timelines may be evaluated. The review team may perform an in-depth evaluation of all responsive proposals based upon the criteria herein. Prior to its final funding decision, the R2WDB may also: 1) meet with representatives of the responding entity to discuss the proposed program and budget; 2) identify and/or negotiate program or budget changes the responding entity must make as a condition of funding; and 3) identify other documentation the entity must provide as a condition of funding; 4) negotiate numbers of adult and dislocated workers to be served.

7. Accessibility and Equal Opportunity

R2WDB is committed to equal access for all customers to all services. All contractors must ensure equal opportunity to all individuals. No individual in Region 2 shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any Workforce Innovation and Opportunity Act funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, sexual orientation, political affiliation, or belief. All entities are expected to demonstrate full compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws. This includes ensuring contract staff receive accessibility training and may involve developing accessibility plans. All respondents must ensure all written materials and communications include the statement: "Reasonable accommodations and auxiliary equipment and services are available upon request."

8. Contract Award

The contract will be awarded based on the most responsive bidder whose offer is most advantageous to the R2WDB in terms of cost, functionality, past performance, and other factors specified in this RFP. The award may be negotiated at the discretion of the R2WDB or made based on the initial bid/offer received, without discussions or requests for best and final offers.

Reference Information

Attachment A: Cover Sheet

Please complete this **mandatory** cover sheet accordingly.

Organization Name				
Address				
Phone Number				
Number of Years in Business				
FEIN #				
DUNS #				
Acknowledgement that Proposing Entity is up to date on taxes and not currently debarred or suspended.		YES		NO
Acknowledgment that the R2WDB reserves the right to review and request further information regarding the respondent's financial situation, if not sufficiently outlined in the submitted audit(s).		YES		NO
Type of Organization (check all that apply)	<input type="checkbox"/>	Higher Education	<input type="checkbox"/>	Private
	<input type="checkbox"/>	Community-Based Org.	<input type="checkbox"/>	Business Organization
	<input type="checkbox"/>	Government Agency	<input type="checkbox"/>	Other (explain)
	<input type="checkbox"/>	Labor Organization		
	<input type="checkbox"/>	Non-Profit		
<input type="checkbox"/>	Employment Service State Agency (Wagner-Peyser)			
Contact Person				
Contact Person's Email Address				
Signatory Authority Signature				

Attachment B: Conflict of Interest Form

By submitting a proposal, the authorized signatory authority of the bidding entity certifies to his/her knowledge and belief that there is no conflict of interest (real or apparent) inherent in the bid or in delivering the scope of work if the R2WDB awards a contract. A conflict of interest would arise if any individual involved in the preparation of this proposal and delivery of services has a financial or other interest or would be likely to gain financially or personally from the award of a contract. The same would hold true for any member of the individual’s family, partner, or an organization employing or about to employ any of the above as a direct result of the successful award of a contract under the RFP. The R2WDB reserves the right to disqualify a bidding entity should a conflict of interest be discovered during the solicitation process.

Signatory Authority Name	Title Signature	Date
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*Note: This form is a **mandatory** required document to be considered for either component. Bidders should only complete this form once per entry.*

Attachment C: Budget

Please complete the **mandatory** budget form and narrative explanation below for Certified Public Accountant, PLLC

Line Item	Budget Amount (Contract Period)
Personnel (Wages/Staff)	\$
Fringe Benefits	\$
Travel	\$
Equipment	\$
Supplies	\$
Communications (including Copying/Printing)	\$
Other	\$
Subtotal Program	\$
Administrative Indirect	\$
TOTAL BUDGET REQUEST	\$

Budget Narrative: Please provide a detailed explanation for each allowable budget line item to justify the cost. Examples of explanations include job titles, wage rate, hours worked/charged, types of benefits and rates, estimated mileage/visits to locations, office and other supplies, and agency program operation or program costs. No travel expenses may be claimed for commute to/from “official station.” Travel expenses may be claimed from the official station. West Virginia State Mileage Rate is \$0.725 (as of 2026).

Attach the Budget Narrative indicating all operating expenses in the listed categories. Each budget category requires an additional line-item detail that addresses the method of calculation and justification for the expense. Therefore, the Respondent shall develop and include a line-item budget to meet the intent and requirements of the program, to ensure the successful implementation of the program, and to show that the program is cost-effective. The Respondent should prepare a realistic and prudent budget avoiding unnecessary or unusual expenditures that would detract from the accomplishment of the objectives and activities of the program.

All funding of this RFP is contingent upon the R2WDB and/or partner agreements having fund availability and may change based on increase/decrease in allocations, de-obligation of funds, new initiatives, and decisions of the R2WDB.

Attachment D: References – Bidders are **required** to provide three letters of references who can verify their experience, along with a contact phone number or email. References should be for experience in the past 5 years.

Reference #1 _____

Email: _____

Reference #2 _____

Email: _____

Reference #3 _____

Email: _____

List the agency contact information for all current contracts or contracts for the past 3 years. Do not duplicate those listed as references.