

**SCHEDULE OF EVENTS**

<u>EVENT</u>	<u>DATE</u>
Deadline for Receipt of Written Questions.....	March 23, 2018
Deadline for Posting Written Responses to the State's Website.....	March 30, 2018
RFP Response Due Date.....	May 18, 2018*
Intended Date for Contract Award (Optional).....	July 1, 2018*

\*The dates above identified by an asterisk are included for planning purposes. These dates are subject to change.

## PROJECT OVERVIEW

The State Workforce Innovation Board (SWIB) oversees the workforce development activities throughout the state of Montana.

The Workforce Innovation and Opportunity Act (WIOA) requires that the one-stop operator is procured through a competitive process. The main role of the One-Stop Operator is to coordinate the service delivery of participating One-Stop partners and service providers.

The purpose of this RFP is to solicit proposals from prospective One-Stop Operators and procure a One-Stop Operator to coordinate the partners and services of Montana's One-Stop system.

The contractor that is selected will be awarded a one-year contract (July 1, 2018 – June 30, 2019) with two options to extend for one year (potentially through June 30, 2021). If Federal or State laws or regulations change the requirements regarding the One-Stop Operator, the winning bidder will be expected to implement any changes as needed.

## SCOPE OF SERVICES

To enable the State to determine the capabilities of an offeror to perform the services specified in the RFP, the offeror shall respond to the following regarding its ability to meet the State's requirements. Please refer to the scoring section for a detailed listing of submittal requirements.

**NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.**

### Provision of Services.

The following types of organizations are eligible to become a One-Stop Operator:

- Government agencies or governmental units, such as:
  - Local or County Governments;
  - School Districts;
  - State Agencies; and
  - Federal WIOA Partners
- Employment Service state agencies under the Wagner-Peyser Act, as amended by title III of WIOA;
- Indian Tribes, tribal organizations, Alaska Native entities, Indian-controlled organizations serving Indians, or Native Hawaiian organizations (collectively referred to herein as “Indian Tribes”);
- Educational institutions such as:
  - Institutions of Higher Education;
  - Nontraditional Public Secondary Schools such as night schools; and
  - Area career and technical education schools.
  - **Elementary and other secondary schools are not eligible to become a one-stop operator.**
- Community-based organizations, nonprofit entities, or workforce intermediaries;
- Other interested organizations that can carry out the duties of the one-stop operator, such as the Chamber of Commerce, other business organizations, or labor organizations; or
- Private for-profit entities.

Entities selected and serving as one-stop operators are subrecipients of a Federal award and thus are required to follow the Uniform Guidance, 2 CFR 200 and WIOA.

SWIB is looking for organizations or entities to serve as the One-Stop Operator for the entire state of Montana.

**RESPONSIBILITIES:** A one-stop operator is the entity that coordinates the service delivery of required one-stop partners and service providers. Following is a list of responsibilities for the selected One-Stop Operator:

- Coordinate, negotiate, and ensure all partners sign the statewide MOU with all required and optional partners in the State of Montana's One-Stop System.
- Coordinate the service delivery of required one-stop partners and service providers (20 CFR 678.620) in accordance with the state of Montana's MOUs.
- Facilitate quarterly meetings with required One-Stop partners, focusing on coordinating partner services within the State of Montana's one-stop centers.
- Review the implementation of Memorandums of Understanding with required WIOA partners and optional partners.
- Make quarterly reports and recommendations to the SWIB's WIOA Committee. Reports may include recommendations for partnership development and improvement as well as continuous improvement of the One-Stop system.
- Ensure the implementation of partner responsibilities and contributions agreed upon in Montana's Memorandum of Understanding

In accordance with WIOA, a one-stop operator may NOT perform the following functions:

- Convene system stakeholders to assist in the development of the state plan;
- Prepare and submit state plans (as required under sec. 107 of WIOA);
- Be responsible for oversight of itself;
- Manage or significantly participate in the competitive selection process for one-stop operators;
- Select or terminate one-stop operators, career services, and youth providers;
- Negotiate local performance accountability measures; and
- Develop and submit budget for activities of the SWIB.

**DELIVERABLES:** Coordinate, negotiate and ensure all required and optional partners in the State of Montana's One-Stop System sign the statewide MOU. Develop quarterly status reports and a final annual report to the SWIB that accurately measure and document operator activities including partner coordination, contributions, and continuous improvement recommendations according to the agreed Memorandum of Understanding.

**EXPECTATIONS:** The following is a list of requirements for the selected One-Stop Operator:

- Avoid Conflicts of Interest when possible and disclose and recuse from unavoidable Conflicts of Interest.
- Follow all policies and procedures of the State of Montana regarding Conflict of Interest, Code of Conduct, Grievance Procedures, and Equal Opportunity provisions.
- Adhere to all federal and state laws and policies.

## OFFEROR QUALIFICATIONS

To enable the State to determine the capabilities of an offeror to perform the services specified in the RFP, the offeror shall respond to the following regarding its ability to meet the State's requirements. Please refer to the scoring section for a detailed listing of submittal requirements.

**NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.**

**Company Profile and Experience.** Offeror shall provide documentation establishing the individual or company submitting the proposal has the qualifications and experience to provide the services specified in this RFP, including, at a minimum:

- a detailed description of your organization’s experience delivering or overseeing WIOA programs, including the service type and dates the services were provided;
- the organization’s organizational structure including staffing patterns and staff qualifications, including a description of how your organizational structure and staffing can ensure quality program administration;
- the organizations knowledge of the workforce development system, labor market conditions, economic development activities, and skill needs and shortages throughout Montana.
- a general description of the firm including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this RFP.

**Equal Pay for Montana Women.** Executive Order No. 12-2016 promoting equal pay for Montana women directs the Department of Administration to include incentives in the RFP process for contractors who engage in best practices to promote wage transparency. These best practices include the following:

- (a) posting salary ranges in employment listings;
- (b) certifying that the contractor will not ask about wage history in employee interviews; and
- (c) certifying that the contractor will not retaliate or discriminate against employees who discuss or disclose their wages in the workplace.

No, I do not agree.

**Statement of Compliance with Equal Pay for Montana Women.** Offeror indicating it will comply with Executive Order No. 12-2016 will receive 5% of the total points available. Offerors who do not comply will not receive the available points. Offerors are required to sign and upload a PDF copy of this certification with their proposal to certify compliance.

Yes, I agree and will comply with the best practices to promote wage transparency outlined in Executive Order No. 12-2016.

Company Name (Clearly Printed): \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## COST PROPOSAL

The State Workforce Innovation Board will award not more than \$75,000 through this RFP process. The Federal Government has not announced what the funding will be for Program Year (PY) 2018 (starting July 1, 2018). The award amount listed in this RFP is based on PY2017 funding. The amount of this contract award will be modified at such time as the board is notified by USDOL of the funding amount.

Offeror must present an itemized budget based on the funding available using the template provided below. In addition, offeror must submit a budget narrative that outlines the rationale for determining the split of funds between services, as well as any approved indirect cost rate and/or cost allocation plan.

Funds are disbursed upon the award of the contract. Funds are audited annually based on proposed expenditures and actual costs. The organization selected as the One-Stop Operator must have an acceptable system for accounting in order to achieve efficient and effective financial operations and to report adequately and accurately.

Procedures must be in accordance with generally accepted accounting principles. The budget narrative must provide descriptive information to demonstrate financial systems to include:

The ability to produce required reports including obligations, unobligated balances, assets, expenditures, and income;

A method to compare actual expenditures to budgeted amounts;

A process to secure supporting source documentation for accounting records;

A process to ensure proper charging of costs and cost allocations.

The ability to sufficiently:

- a. permit tracking of funds to a level of expenditure adequate to establish that funds have not been used in violation of the applicable restrictions on the use of such funds; and
- b. minimize the time elapsed between the receipt of funds and the disbursement of those funds for program activity;

Effective internal controls to safeguard assets and assure their proper use; and

The ability to manage and administer programs in compliance with federal, state and local laws, regulations, and policies. This includes disclosure of any audit and/or fiscal compliance problems identified during monitoring that led to formal corrective action, within the past five years and their resolutions.

The offeror will be required to submit quarterly and annual financial reports to the administrative entity as designated by the SWIB.

Budget Template:

Line Item Description	Cost (\$)
Personnel	
Fringe	
Travel/Outreach	
Occupancy (rent, utilities, etc.)	
Communications	
Office Supplies	
Equipment	
Indirect or Cost Allocation (may include payroll)	
Other (must be broken down by line item)	
<b>Total</b>	

## EVALUATION PROCESS

### BASIS OF EVALUATION

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of 200 points.

**The Ability to Meet Scope of Service, Offeror Qualification and Budget** portion of the proposal will be evaluated based on the following Scoring Guide. Signed Certification of Compliance with Executive Order No. 12-2016 will receive 5% of the total available points.

**Achieve Minimum Score.** Any proposal that fails to achieve **60% of the total available points for the RFP or a total of 120 points** will be eliminated from further consideration. A "fail" for any individual evaluation criteria may result in proposal disqualification at the discretion of the procurement officer.

**SCORING GUIDE**

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

A) Company Profile and Experience -ABSTRACT (0-10 points)

The abstract is an executive summary of the offerors ability to coordinate all required partners and services throughout Montana’s One-Stop system and meet the specified responsibilities, deliverables, and expectations outlined in the RFP.

0-3	Abstract is poorly written and reflects none of the key elements outlined in the RFP.
4-7	Abstract is adequately written and reflects on most of the key elements outlined in the RFP.
8-10	Abstract is written exceptionally well and reflects all of the key elements outlined in the RFP.

B) Company Profile and Experience - STAFF QUALIFICATIONS (0-20 points)

Staff of the One-Stop Operator must be qualified and adequately trained to oversee Montana’s One-Stop system. Describe staff qualifications and how staff will work to support Montana’s One-Stop system. In addition, describe staff opportunities for professional development in order to better oversee Montana’s One-Stop system.

0-6	Applicant failed to identify sufficient staff or address its commitment to professional development to ensure staff are qualified to oversee Montana’s One-Stop system.
7-13	Applicant adequately identified sufficient staff and addressed its commitment to professional development to ensure staff are qualified to oversee Montana’s One-Stop system.

14-20	Applicant did an exceptional job at identifying sufficient staff and addressed its commitment to professional development to ensure staff are qualified to oversee Montana's One-Stop system.
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- A) Company Profile and Experience -WIOA ONE-STOP DESIGN AND PROGRAM INTEGRATION (0-50 points)  
 The applicant must describe how Montana's One-Stop system and its required partners integrate service delivery to best meet the needs of clients using the systems or programs housed under the One-Stop model.

0-10	Applicant's description of program integration within the One-Stop system is poorly written and no elements of coordination or integration were listed.
11-20	Applicant's description of program integration within the One-Stop system is loosely written and some elements of coordination and integration of services were listed
21-30	Applicant's description of program integration within the One-Stop system is adequately written and elements of coordination and integration of services were listed
31-40	Applicant's description of program integration within the One-Stop system is well written and elements of coordination and integration of services were thoroughly discussed.
41-50	Applicant's description of program integration within the One-Stop system is exceptionally well written and elements of coordination of services were thoroughly discussed and analyzed.

B) Scope of Services -STATEWIDE MOU COORDINATION (30 points)

The applicant must describe WIOA's MOU requirements and how it intends to coordinate the MOU among all partners and ensure that partners sign the MOU as required in WIOA.

0-7	Applicant failed to adequately describe WIOA's MOU requirements and its plan to coordinate the MOU among all required partners.
8-15	Applicant loosely described WIOA's MOU requirements and its plan to coordinate the MOU among all required partners.
16-22	Applicant adequately described WIOA's MOU requirements and its plan to coordinate the MOU among all required partners.
23-30	Applicant thoroughly described WIOA's MOU requirements and described a well-developed plan to coordinate the MOU among all required partners.

C) Scope of Services -QUARTERLY MEETING COORDINATION (20 points)

The applicant must describe its plan to coordinate quarterly meetings among all partners and how it will leverage technology and other resources to ensure participation among partners. All meetings must comply with open meeting laws and all meeting minutes and materials must be publicly available and accessible online.

0-6	Applicant failed to adequately describe how it will coordinate quarterly meetings among all required partners.
7-13	Applicant adequately described its plan to coordinate quarterly meetings and ensure the meetings are properly noticed and all meeting materials are publicly available and accessible online.



14-20	Applicant thoroughly described its plan to coordinate quarterly meetings and ensure the meetings are properly noticed and all meeting materials are publicly available and accessible online.
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D) Cost Proposal -BUDGET/ACCOUNTING (40 points)

The applicant's budget narrative must discuss how the funds awarded will enable it to meet the requirements of this RFP. In addition, the applicant must discuss the system it uses to track spending to ensure funds are accurately accounted for as described above.

0-9	Applicant failed to adequately describe how it will spend and account for funds awarded through this RFP.
10-19	Applicant loosely described its plan to spend and account for funds to meet the obligations of this RFP.
20-29	Applicant adequately described its plan to spend and account for funds to meet the obligations of this RFP.
30-40	Applicant thoroughly described its plan to spend and account for funds to meet the obligations of this RFP.

E) Scope of Services -BOARD COORDINATION (30 points)

The applicant must coordinate and regularly report out to the State Workforce Innovation Board. Applicant should discuss its coordination plan to ensure that the applicant is meeting its responsibilities as the One-Stop Operator and its deliverables are timely and presented in a format that's acceptable to the board.

0-7	Applicant failed to adequately describe how it will coordinate with the board.
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8-15	Applicant loosely described its plan to coordinate with the board to ensure its meeting its responsibilities as the One-Stop Operator and it's meeting its obligatory deliverables.
16-22	Applicant adequately described its plan to coordinate with the board to ensure its meeting its responsibilities as the One-Stop Operator and it's meeting its obligatory deliverables.
23-30	Applicant thoroughly described its plan to coordinate with the board to ensure its meeting its responsibilities as the One-Stop Operator and it's meeting its obligatory deliverables.

RFP Application Components	Required/ Optional	Possible Points	Points Earned
Consideration A: Abstract	Required	10	
Consideration B: Staff Qualifications	Required	20	
Consideration C: WIOA One-Stop Design and Program Integration	Required	50	
Consideration D: Statewide MOU Coordination	Required	30	
Consideration E: Quarterly Meeting Coordination	Required	20	
Consideration F: Budget/Accounting	Required	40	
Consideration G: Board Coordination	Required	30	
Equal Pay Executive Order	Optional	10 or 5%	
Total Points Possible/Earned		210	

**CONTRACT**