

Competitive Notice of Funding Opportunity to deliver WIOA Title I – Adult Program Services

Schedule of Events

Event	Date
Competitive Grant Award Opportunity Issued	May 7, 2026
Pre-Submission Conference	May 14, 2026, 9:00-11:00 a.m. (MST)
Deadline for Receipt of Written Questions	May 26, 2026, 5:00 p.m. (MST)
Deadline for Posting Written Responses	May 29, 2026, 5:00 p.m. (MST)
Applications Due	June 8, 2026, 11:59 p.m. (MST)
Anticipated Date for Award	July 1, 2026

Pre-Submission Conference

An optional Pre-Submission Conference will be conducted on Teams on May 14, 2026, 9:00-11:00 a.m. (MST). Offerors are encouraged to use this opportunity to ask clarifying questions, obtain a better understanding of the project, and to notify Montana Department of Labor and Industry (MTDLI) of any ambiguities, inconsistencies, or errors discovered upon examination of this Competitive Grant Award process. All responses to questions during the Pre-Submission Conference will be oral and in no way binding on MTDLI.

Teams Call: [Pre-Proposal Conference \(WIOA Title I - Adult Program Services\) | Meeting-Join | Microsoft Teams](#)

Questions and Answers

MTDLI anticipates that potential Offerors will have questions as they review the Competitive Grant Award opportunity and is committed to providing answers to the best of their ability, as well as publishing these questions and answers for all potential Offerors to review. The final day to submit questions is May 26, 2026, at 5:00 p.m. (MST). Questions received after that time will not receive a response. All questions and answers will be publicly posted on the [State Workforce Innovation Board](#) website.

E-mail questions to MTDLI_WIOA@mt.gov and label the subject line Title I – Adult Program Services.

Submittal of Application

MTDLI must receive responses no later than **11:59 p.m. (MST) on June 8, 2026. Late submissions will not be accepted.** Make sure to label all attachments correctly. If you have any questions, you can e-mail MTDLI_WIOA@mt.gov and label the subject line Title I – Adult Program Services.

To submit a response, click on the link: [Submittable](#)

I. INTRODUCTION

The STATE OF MONTANA, Data and Operations Bureau (DO) of the Workforce Services Division (WSD) within Montana Department of Labor & Industry (MTDLI), in compliance with the Workforce Innovation and Opportunity Act (WIOA), is soliciting applications from experienced and qualified organizations to provide essential workforce development services through the WIOA Title I - Adult Program. The Department intends to award two-year subawards covering program years 2026 (July 1, 2026-June 30, 2027) and 2027 (July 1, 2027-June 30, 2028), subject to satisfactory performance and the availability of federal funds. At the conclusion of this period of performance, the Department anticipates issuing a new competitive funding opportunity for PY28 subawards. Prior participation does not guarantee future funding; however, subrecipients with strong performance in PY26 and PY27 may receive competitive preference in the PY28 review process, as described in the future solicitation.

Montana Department Labor & Industry's Workforce Services Division is the designated Administrative Entity for the WIOA Adult Program in the State of Montana. WSD staff are responsible for providing technical assistance and conducting oversight activities, including funding and program management, during the award period.

WIOA is a federal law 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. WIOA requires states to strategically align their core workforce development programs to coordinate the needs of both job seekers and employers. Additionally, WIOA promotes accountability and transparency through negotiated performance goals that are publicly available, fosters regional collaboration within states through local workforce areas, and improves the American Job Center system.

The WIOA system is built around the following key principles:

- Businesses will inform and guide the workforce system, ensuring that services are well aligned with their workforce needs.
- Improved access to education and workforce services for participants with significant barriers to employment, veterans, participants with disabilities, out-of-school and at-risk youth, and other populations so all individuals have equitable access to quality employment opportunities.
- Use of customer-centered, job-driven strategies, such as career pathways, business engagement systems, sector strategies, and work-based learning.
- Better alignment of federal investments across job training and education programs, to coordinate service delivery across programs for shared participants, improve efficiency, and ensure that the workforce system connects participants with high-quality services.
- For purposes of Title I, to provide workforce investment activities through statewide and local workforce development systems that increase the employment, retention, and

earnings of participants and increase attainment of recognized postsecondary credentials by participants; and as a result, improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet the skill requirements of employers, and enhance productivity and competitiveness.

Subrecipients must follow requirements specified in the Workforce Innovation and Opportunity Act, Public Law 113-128, and all policies and procedures set forth by WSD in executing program elements. This includes compliance with all policies and guidance as established and provided by the Governor's State Workforce Innovation Board (SWIB). WIOA policies can be viewed at [WSD Policy](#). Failure to abide by these requirements may result in loss of funding. Offeror's responses must demonstrate knowledge of WIOA regulations, career services, training activities, allowable costs, and performance standards.

MTDLI is committed to fostering a skilled and adaptable workforce that meets the needs of Montana's businesses and industries, with WIOA programs being a key component of these efforts. In implementing WIOA in Montana, MTDLI is seeking responses with strategies and framework aligned with both federal and state workforce initiatives, America's Talent Strategy and 406 JOBS.

[America's Talent Strategy](#)

America's Talent Strategy lays out a comprehensive plan to address the workforce needs of American companies, integrate existing workforce development systems to maximize efficiency and effectiveness, provide accountability for workforce training programs, upskill incumbent American workers, and develop alternatives to four-year college degrees.

It rests on five strategic pillars:

- **Industry-Driven Strategies** – This pillar aims to align the workforce system with employer needs. To achieve this, programs will leverage high quality work-based-learning models, including Registered Apprenticeship, and align training programs to career pathways to fill talent shortages in priority industries.
- **Worker Mobility** – Bringing more Americans into the labor force and helping them advance based on demonstrated skills and attainment of credentials valued in the labor market. Programs will help eliminate barriers that prevent labor force participation and connect workers to training opportunities that lead to self-sufficiency.
- **Integrated Systems** – Operating programs in a streamlined, coordinated system that delivers unified workforce services and effectively leverages available resources. Programs will effectively refer between and leverage resources from partner programs and resources for effective service delivery.
- **Accountability** – Ensuring federally funded workforce programs deliver measurable results by linking investment to outcomes and delivering strong performance outcomes.
- **Flexibility & Innovation** – Creating new models of workforce innovation built to match the speed and scale of AI-driven economic transformation.

To learn more about the five strategic pillars and read the entire strategy, view the full [America's Talent Strategy](#) plan.

406 JOBS: Modernizing Montana's Workforce

On August 11, 2025, Governor Greg Gianforte announced the 406 JOBS initiative and signed [Executive Order 5-2025](#) establishing the initiative. 406 JOBS is designed to modernize Montana's workforce, ensuring that every Montanan has a pathway to a career and a plan to achieve it.

Workforce goals:

- Ensure every Montanan has a clear and actionable career pathway.
- Reduce barriers for participants who have exited the workforce.
- Achieve consistent quarterly growth in the labor force participation rate.
- Increase the number of Montanans achieving financial self-sufficiency

To accomplish these goals, the 406 JOBS initiative incorporates initiatives to emphasize and expand apprenticeship and pre-apprenticeship pathways, use local sector partnerships to engage employers and industry in the workforce pipeline and identify industry-demanded credentials and skills, and reduce barriers to employment for key populations including parents facing childcare shortages, veterans, and participants reentering the labor market following incarceration.

Learn more about this initiative:

- [406 JOBS Summary PDF](#)
- [Year One Work Plan One Pager PDF](#)
- [Year One Work Plan PDF](#)

I. SCOPE OF SERVICES

Program

This Competitive Grant Award opportunity is for the WIOA Adult Employment and Training program.

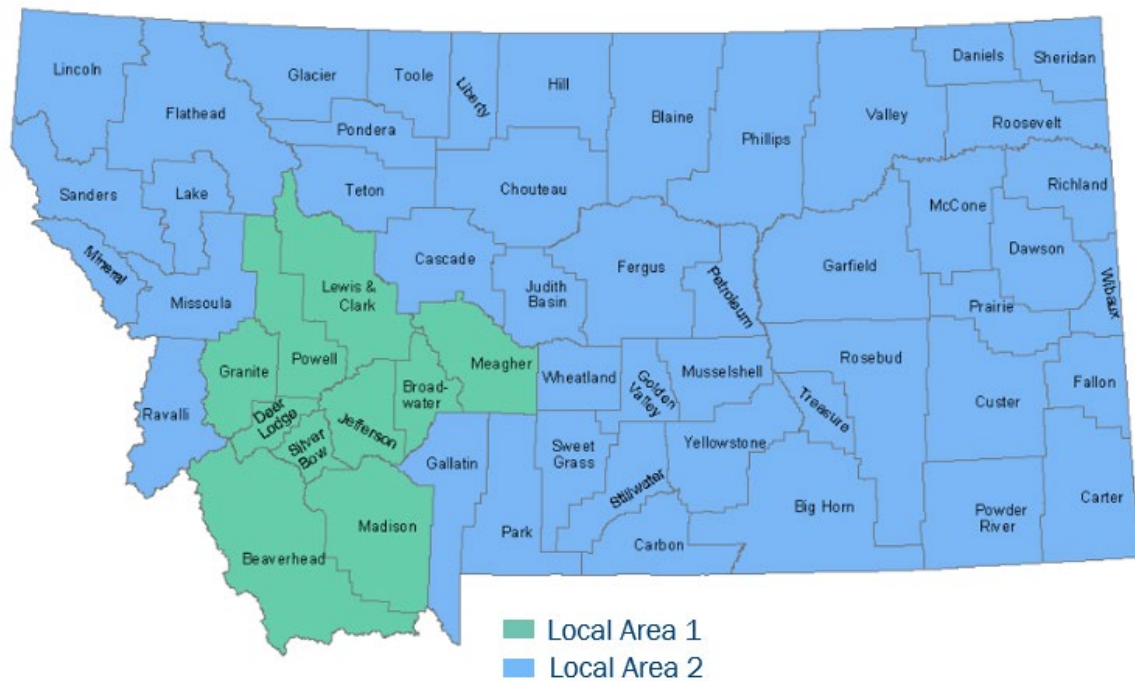
- **Adult Employment and Training program:** This program provides resources to enable workers to obtain or retain in-demand jobs by providing workforce services such as career guidance, training opportunities, and job search assistance. The Adult Program is designed to:
 - Help employers meet their workforce needs by connecting them to workers trained in industry-demanded skills;
 - Provide eligible adults with basic and individualized career services and the training services necessary to obtain high-paying jobs; and
 - Prioritize provision of these services to recipients of public assistance; other low-income participants; and participants who are basic skills deficient.

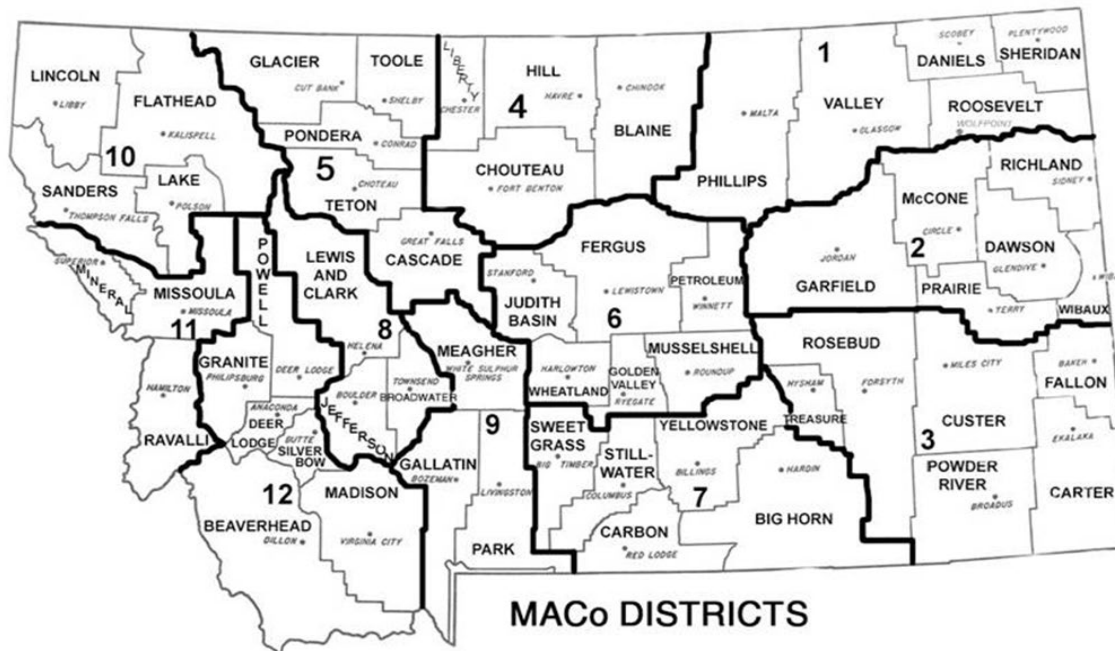
[TEGL 19-16](#) provides guidance on services provided through the Adult Program. **Attachment – WIOA Glossary of Terms and Definitions** includes the variety of categories of participants who qualify as an adult.

Geographic Coverage

If applying for the Adult Program:

- One (1) or more award will go to Local Area 1 with one (1) or more awarded to Local Area 2. Local Area 1 consists of: Lewis & Clark, Silver Bow, Granite, Powell, Deer Lodge, Jefferson, Broadwater, Meagher, Beaverhead, and Madison Counties. Local Area 2 consists of the remaining 46 counties in the state.
- If applying for funding, the local area must be identified. Applications covering both local areas will not be considered, as funds are specific to the identified local area. An offeror applying to provide services within more than one local area must submit one response per local area. General requirements will be evaluated, and local-area-specific requirements will be evaluated separately.
- Offerors must indicate which district(s) they plan to serve within each local area. For this Competitive Grant Award opportunity, Montana is separated into 12 MACo districts.





MACo DISTRICTS

Offerors are encouraged to apply in a way that allows them to best meet the scope of services within the local area. WSD will accept responses that include partner organizations or sub-subrecipients, but one agency must be designated as the lead fiscal agent and submit the application. Offerors are expected to know their local areas well, work with other WIOA core partners, partner with other organizations, and have strong employer partnerships.

Funding

Funding for the WIOA Title I Adult Program is allocated by United States Department of Labor (USDOL) in two increments: the first increment is effective July 1, and the second increment is effective October 1. The amount of incremental funding allocated is determined by USDOL annually. Funds awarded under this Competitive Grant Award process will be allocated in the same incremental manner to the subrecipients as determined by USDOL.

The available amounts are approximate and based on program year 2025 funding. Actual available funding will be modified when USDOL announces funding for program year 2026. (July 1, 2026 - June 30, 2027)

Adult Program:

An approximate total of **\$1,721,625** for the Adult Program will be awarded with this Competitive Grant Award funding opportunity.

The following is the current breakdown of the approximate funding available for each Local Area during the award period.

Local Area 1	Local Area 2
\$237,149	\$1,484,476

The following is the current breakdown of the approximate funding available for each MACo District during the award period.

MACo District	Dollar Amount
District 1	\$109,461
District 2	\$100,833
District 3	\$108,891
District 4	\$100,541
District 5	\$215,637
District 6	\$106,225
District 7	\$232,962
District 8 (Local Area 1)	\$110,525
District 9	\$84,595
District 10	\$226,736
District 11	\$198,595
District 12 (Local Area 1)	\$126,624

The available amounts are approximate and based on program year 2025 funding.

Note: Actual available funding will be modified when the federal US Department of Labor announces funding for program year 2026. (July 1, 2026 - June 30, 2027)

Terms and Renewal of Awards

The Department intends to award two-year subawards covering program years 2026 (July 1, 2026-June 30, 2027) and 2027 (July 1, 2027-June 30, 2028), subject to satisfactory performance and the availability of federal funds. At the conclusion of this period of performance, the Department anticipates issuing a new competitive funding opportunity for PY28 subawards. Prior participation does not guarantee future funding; however, subrecipients with strong performance in PY26 and PY27 may receive competitive preference in the PY28 review process, as described in the future solicitation.

Subrecipients that do not meet grant requirements risk loss of funding at any point in the grant period. The grant award may be terminated by either the Subrecipient or MTDLI with a 30-day written notification.

Award renewals will be made on a program-by-program basis and will be contingent on the following:

- Funding availability,
- Successful implementation of the terms of the award,
- Meeting performance expectations, and
- Organizational need.

MTDLI reserves the right to make grant awards under this appropriation without discussion with the applicants. Therefore, submissions should represent the applicant's best effort from both a technical and cost standpoint.

Right to Re-Compete

MTDLI reserves the right to hold a new competitive grant competition, if deemed necessary.

Non-Appropriation of Funds

All awards are subject to the availability of federal funds. Grants are not final until an award letter is executed by MDTLI.

Direct and Equitable Access

MTDLI is committed to conducting a Competitive Grant opportunity that ensures direct and equitable access to all eligible applicants. Information regarding this application and its process is available via the [MTDLI website](#).

One-Stop Centers and One-Stop Operator

WIOA One-Stop Centers and the WIOA One-Stop Operator are two interconnected parts of Montana's workforce system and serve as a cornerstone of the WIOA one-stop delivery system.

One-Stop Career Centers are physical locations (and virtual platforms) that bring together various workforce development programs and services under one roof (and online portals). These are "one-stop shops" for job seekers and employers seeking workforce solutions. Typical services found in the WIOA One-Stop Center include:

- Career Services such as job search assistance, resume writing workshops, and career counseling.
- Training Resources such as information on training programs, scholarships, and apprenticeships.
- Employment Services such as job listings, employer connections, and interview preparation support.
- Support Services such as referral to childcare assistance, transportation assistance, and financial aid resources.

The WIOA One-Stop Operator is the entity responsible for overseeing the day-to-day operations of a WIOA One-Stop Center. Some key responsibilities of a WIOA One-Stop Operator include:

- Coordinating services by ensuring all the different programs and services offered at the One-Stop Center work together seamlessly.
- Managing resources by allocating staff, funding, and other resources effectively to deliver quality services.
- Maintaining partnerships by collaborating with various stakeholders like government agencies, community organizations, and employers to stay informed about local workforce needs.
- Performance measurement through tracking program outcomes and ensuring the One-Stop Center meets established goals for job placement and participant success.

In essence, the WIOA One-Stop Center provides a centralized location for workforce development resources, while the WIOA One-Stop Operator ensures its efficient and effective operation.

The designated One-Stop Center in Montana is the Great Falls Job Service. The designated One-Stop Center, along with 17 additional Montana Job Service offices create the network of 18 American Job Centers as referenced in WIOA. Montana's One-Stop Operator was selected by the State Workforce Innovation Board (SWIB). Currently, Montana's One-Stop Operator is the Job Service Bureau within the Montana Department of Labor & Industry.



Because WIOA requires partnership between Montana's One-Stop Center and WIOA core programs, MTDLI requires co-location of the Adult Subrecipient within the designated One-Stop Center (Great Falls Job Service-MACo District 5) to provide services at the One-Stop Center. The Adult Subrecipients of the other 11 MACo districts are recommended to be located within the Job Service offices whenever possible. As required under WIOA, co-location is subject to infrastructure cost-sharing agreements, to support coordinated service delivery across partner programs.

Primary Stakeholders

Adult Subrecipients are expected to work closely with three primary stakeholders within the district: participants, employers, and other partners (including WIOA Core Programs).

Employer Engagement

WIOA emphasizes the importance of partnering with employers because aligning workforce development programs with employer needs helps participants secure jobs and ensures programs effectively fill Montana's talent shortages. Subrecipients must be able to work with employers to understand and identify the skills and competencies that are needed to train participants for employment available in the community.

It is critical Subrecipients develop relationships with local Montana business and industries to ensure an understanding of the local labor market needs. Subrecipients should have experience

reaching a variety of businesses using diverse outreach methods and should participate in local sector partnerships that represent high demand sectors in their service areas.

An established working relationship allows for collaboratively building solutions to meet business needs. Subrecipients must be skilled at customizing solutions to business needs by utilizing a variety of resources and service strategies. Successful offerors should have experience with sector groups demonstrating efficiency in serving businesses and industry.

Subrecipients will analyze performance and outcome information and solicit feedback from business and industry as they facilitate connections between workers, training providers, and community partners. Subrecipients must be capable of adapting to changing needs of their participants and communities. Measurable improvement in desired outcomes is the goal.

Participant Engagement

MTDLI seeks offerors experienced in delivering workforce services to participants using a coaching model. Coaching models guide participants through a logical sequence of setting goals and reaching them with support. Adult Program services should be structured so that coaches and participants ensure interactions and interventions are purposeful and valuable. Defining the outcome at the beginning allows career coaches and participants to stay on track as they work toward achieving success.

Skilled career coaches are committed to empowering participants, are observant, and able to identify participant needs at all points in the process and implement interventions appropriately. Effective career coaches can co-create relationships, challenge attitudes, beliefs, and perspectives, hold participants accountable to actions and goals, and encourage growth and transformations while ensuring program expectations are met.

- **Outreach, Engagement, and Service Delivery:** Subrecipients must take a proactive approach to find and engage appropriate participants who will benefit from the full continuum of services to explore, plan, and reach training and employment goals. Delivering in-person services is recommended and preferred. Financial hardship may prevent some participants from physically accessing services at a subrecipient's location, and in these situations, travel to other communities throughout the district may be required. Alternatives may include meeting participants closer to their home or work location and/or providing virtual or remote opportunities.
- **Eligibility, Assessment, and Career Exploration:** Adult Program services may only be provided to participants who meet eligibility criteria. Additional Priority of Service designation will need to be met to qualify for individualized career services and training services. Eligibility and Priority of Service is outlined in the WIOA Adult [WSD Policy](#).

Subrecipients will determine which participants are appropriate for participation in the Adult Program. Quality screenings and assessments designed to identify skills, abilities, preferences, and needs play a key role in determining whether an individual is

appropriate for Adult enrollment. WIOA's target population focuses on participants willing and able to gain the skills and qualifications needed to fill in-demand and high-wage Montana jobs. Additionally, subrecipients must be able to identify barriers participants face in the labor market and the appropriate services, training, and support to overcome them.

Subrecipients must effectively use labor market information to ensure career exploration results in identifying career pathways that lead to in-demand high-paying jobs. Subrecipients are also expected to help participants explore how their skills and abilities transfer across careers to quickly identify career pathways that align with existing skills and abilities.

Subrecipients must demonstrate experience evaluating and using employability screenings and assessment results in directing participants to good fit career options. Subrecipients have flexibility in determining which tools to use. MTDLI prefers strengths-based assessments. Subrecipients should not conduct assessments outside their scope or beyond their level of training or expertise. Participants requiring specialized assessments should be referred to community resources.

Subrecipients will utilize an array of career awareness and exploration options with potential participants prior to starting any career planning activities. Career awareness and exploration activities allow participants to learn about various careers, enabling informed decision-making. Participants may explore careers through online education and research, with the assistance of a career coach, or hands-on-learning experiences such as environmental career exploration opportunities with employers. Career guidance should promote long-term success for both businesses and WIOA participants.

Subrecipients must have experience capturing and maintaining verification documentation and assisting participants in obtaining required documents to prevent this from becoming a barrier.

- **Career Planning and Enrollment:** Career coaches will guide participants in defining education and career goals that lead to high-wage, self-sustaining employment through attainment of skills and industry-recognized credentials. Coaches will identify gaps in knowledge and skills and help establish action steps. Successful offerors will have experience helping participants determine what to do, how to do it, where to seek help, and when tasks will be completed. The rationale behind each goal must also be clearly understood.
- **Implementation:** Enrolled participants will work on their career plans with the support of their career coach. Ongoing meetings to evaluate progress, amend tasks, and document milestones are essential. Skilled career coaches identify barriers that arise during participation and determine when additional assistance is needed versus when participants should develop their own solutions. Celebrating progress reinforces

achievement and motivates participants to continue working toward goals.

- **Successful Completion:** The coaching process does not end with training completion. A seamless transition from training to self-sustaining employment is essential. Employment support—such as resume development, interview preparation, and barrier reduction—should be provided while the participant is engaged in skill development. A jointly developed career plan supports the participant’s employment goals.

Partnerships

Successfully providing Adult Program services requires strong partnerships with workforce development agencies at the local and state levels, as well as community organizations that support participant wellbeing. This Competitive Grant Award opportunity is intended to foster collaboration. WIOA is one of many programs providing workforce development services to Montanans. Subrecipients are expected to partner with other programs to leverage additional funding and services whenever possible. The Adult Program should function as one option within a menu of services that supports Montana businesses and participants on their path to self-sufficiency.

Subrecipients are responsible for establishing and maintaining partnerships with a full array of workforce development and human services providers in their local area. Demonstrating an in-depth understanding of available resources to best support participants while avoiding duplication of services is required. Subrecipients will make referrals to and accept referrals from various community partners. MTDLI believes community partners working together are more effective than each agency or program working alone.

It is expected that subrecipients will partner with other workforce development programs to leverage additional funding streams and services. Co-enrollment with other workforce development programs is highly recommended and encouraged. The WIOA Adult Program should be one option in a menu of services that supports Montana businesses and participants on their journey to self-sufficiency.

WIOA Core Programs

- **Title I Adult Program:** Assists eligible adults seeking to enter or re-enter the workforce, improve occupational skills, or advance in careers. (Program administered by MTDLI)
- **Title I Dislocated Worker Program:** Provides targeted services to participants who have lost their jobs due to no fault of their own. (Program administered by MTDLI)
- **Title I Youth Program:** Helps youth ages 14-24 obtain education, training, and work experience for successful workforce entry. (Program administered by MTDLI)
- **Title II Adult Education & Family Literacy Programs:** Focus on improving literacy and educational skills for adults. (Program administered by MTDLI)
- **Title III Wagner-Peyser Services:** Provides job search assistance and labor market

information to all job seekers. (Program administered by MTDL)

- **Title IV Vocational Rehabilitation Services:** Assists individuals with disabilities in preparing for, obtaining, and retaining employment. (Program administered by MT DPHHS)

Wagner-Peyser

Wagner-Peyser establishes a nationwide system of public employment offices, known as the Employment Service (ES). ES is a required WIOA core program that provides labor exchange services to job seekers and assists businesses by referring qualified workers. ES services are delivered through Montana's 18 Job Service offices.

Program Eligibility

Subrecipients will determine eligibility and assist applicants in obtaining necessary documentation. After eligibility criteria are satisfied, Subrecipients will determine appropriateness for individual program enrollment.

Eligibility Criteria (Adult Program)

- 18 years of age or older
- U.S. Citizen or authorized to work in the United States; and
- Meet Selective Service registration requirements, if applicable.

Adult Program Appropriateness Criteria

After eligibility criteria are met, individuals must meet at least one Priority of Service requirement before they are appropriate for enrollment.

There are three (3) Priority of Service categories allowable:

- Veteran and/or eligible spouse
- WIOA priority groups (recipients of public assistance, low-income, basic skills deficient);
or
- Individuals with a significant barrier to employment.

When Adult Program funds are limited, Priority of Service must be applied in a specific order. Category 1 is highest priority, and category 5 is the lowest priority.

1. Veteran and/or eligible spouse who meets the WIOA priority group criteria (public assistance recipient, low-income individual, or basic skills deficient).
2. Other participants (not veterans or eligible spouses) who meet the WIOA priority group criteria.
3. Veterans and eligible spouses with a significant barrier to employment.
4. Other participants (not veterans and eligible spouses) with a significant barrier to employment.
5. All other veterans and eligible spouses.

Additional details for eligibility can be found in the Adult Policy. [WSD Policy](#)

Enrollment Process

The Adult enrollment process connects Montanans to high-wage, in-demand careers through an employer-driven coaching model. This approach supports both 406 JOBS priorities and America's Talent Strategy by emphasizing skills-based pathways, labor market alignment, and strong employer engagement.

Participants eligible for enrollment must participate in a holistic assessment process designed to build clarity, confidence, and alignment with labor market demands. Core components include:

- Personal and career assessments
 - Identification of strengths, transferable skills, interests, and barriers.
 - Career exploration aligned with in-demand industries and occupations identified through Montana Labor Market Information and employer engagement.
- Career choices must reflect real hiring needs and employment opportunities.
- Development of high-quality career plan with an employment goal that is:
 - High wage
 - In-demand
- Ongoing coaching appointments:
 - Track progress toward career goals
 - Access supportive service needs
 - Determine training and/or work based learning options

Activities and Services

All eligible participants qualify to receive basic career services in the Adult Program. However, only applicants who meet program appropriateness criteria may receive individualized career services. Individualized career services include specialized assessments, development of an individual employment plan, training/classroom learning, employment and training support or on-the-job training. WIOA is not an entitlement program, and not all activities and services are suitable for all job seekers.

Montana's workforce ecosystem is always evolving. Subrecipients must work in coordination with WSD as expectations shift based on new initiatives or directives, and federal guidance. At times, SWIB (State Workforce Innovation Board) or WSD (Workforce Services Division) may implement restrictions on eligibility or training services or direct special grants to reach targeted populations or business needs. Subrecipients must remain flexible and compliant when directives change.

Activities and services available to enrolled participants are divided into the following categories. All successful offerors will be required to provide these activities and services as appropriate.

Basic Career Services

- Eligibility determination for adult participants.
- Outreach, intake, and orientation information and other services are available through the one-stop delivery system.
- Initial assessment of skill levels (literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills-gaps), and supportive service needs.
- Labor exchange services.

- Job search and placement assistance.
- Individual career counseling
 - Information on in-demand industry sectors and occupations.
 - Information on non-traditional employment.
- Recruitment and other business services on behalf of employers, including information and referrals to specialized business services.
- Referrals to and coordination of activities with other programs and services.
- Workforce and labor market employment statistics information, including:
 - Job vacancy listings.
 - Information on job skills is necessary to obtain the vacant jobs listed.
 - Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- Performance information and program cost information on eligible providers of education, training, and workforce services by program and type of providers.
- Information regarding how the local area is performing on performance measures.
- Information relating to the availability of supportive services or assistance, and referrals to those services and assistance, including childcare; child support; Medicaid; SNAP; TANF; and the earned income tax credit.
- Information and assistance filing a claim for unemployment compensation.
- Assistance establishing eligibility for financial aid assistance for training and education programs not provided under WIOA.

Individualized Career Services

- Comprehensive and specialized assessments of the skill levels and service needs that may include:
 - Diagnostic testing and use of other assessment tools.
 - In-depth interviewing and evaluation for identifying employment barriers and appropriate employment goals.
- Development of an individual employment plan, that identifies the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the employment goals, including providing information on Montana's Eligible Training Providers (ETPs) and career pathways to attain career objectives.
- Group counseling.
- Individual counseling.
- Career planning.
- Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare participants for unsubsidized employment or training.
- Internships and work experiences that are linked to careers.
- Workforce preparation activities.
- Financial literacy services.
- Out-of-area job search assistance and relocation assistance.
- English language acquisition and integrated education and training programs.

Case Management

Case management responsibilities include but are not limited to:

- Documenting monthly contact or contact attempts with participants.
- Providing a countable activity every 90 days (refer to **Attachment - WIOA.49**).

- Maintaining participant files by recording all activities, program services, outcomes, case notes, and documentation in Montana’s Management Information System.

Supportive Services

Available to enable enrolled adults to participate in WIOA activities when they cannot obtain services through other programs.

Training Services

Training services may be provided to participants through various methods, including contracts or Individual Training Accounts (ITAs). Unless otherwise noted, training services must be on Montana’s Eligible Training Provider List (ETPL).

- Requires ETP
 - Occupational skills training, including training for nontraditional employment
 - Training programs operated by the private sector
 - Skill upgrading and retraining
 - Entrepreneurial training
 - Registered Apprenticeship
- Does not require ETP
 - On-the-job training (OJT)
 - Short Term Prevocational Service
 - Incumbent Worker Training (IWT)
 - Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training
 - Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with services
 - Job readiness training
 - Programs that combine workplace training with related instruction
 - Transitional jobs
 - Work experience (WEX)

Follow-Up Services

- Follow-up services must be provided to participants who exit to federal employment, railroad employment, self-employment, agricultural employment, or military.
- Participants who exit without a recorded credential must also receive follow up if they were in classroom training utilizing training funds during active case management.
- Quarterly contact must be made with these participants to obtain wages, employment information, and credential information as this information is required for performance measures and is not available through other systems.

Administrative Requirements

Case Administration

Subrecipients must maintain accurate client records. WSD will define specific case file documentation in the MIS system. In general, case records will include:

- Enrollment Information
- Eligibility and Appropriateness Documentation
- Employment Assessments

- Labor Market Information
- In-Demand Occupation Information (O*NET)
- Goal and Action Planning
- Individual Employment Plan
- Individual Training Account (ITA) documentation
- Activity Tracking and Program Services
- Financial Assessments
- Funding Documentation
- Referrals and Co-Enrolled Programs
- Outcomes
- Follow-Up Services
- Case Notes

Department Led Meetings

WSD will work closely with Subrecipients, communicating openly and involving them when making decisions based on reported data. Attendance at regular department-led training sessions, technical assistance calls, and focus groups will be required. Learning opportunities will allow Subrecipients to interact with other providers in other parts of the state. The Department will give advance notice, and most sessions will be offered remotely using Teams or Zoom. WSD will be responsible for conducting oversight activities including fiscal and program management.

Federal Performance Measures

WSD is committed to partnering with qualified Subrecipients who demonstrate dedication to achieving successful outcomes for WIOA participants. To ensure effective use of resources and maximize program impact, Subrecipients are held accountable for meeting performance expectations aligned with federal WIOA measures.

Core Performance Measures:

1. **Enrollment Goals** are based on the submitted responses and final funding availability.
2. **Measurable Skill Gains** (MSGs) tracks the progress of participants in an education or training program leading to a recognized secondary credential, postsecondary credential, or employment. (PY 2025 expected percentage for Adult is 56%)
3. **Credential Attainment** is defined as a credential consisting of an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the state or federal government, or an associate or baccalaureate degree. (PY 2025 expected percentage for Adult is 53%)
4. **Employment Rate – 2nd Quarter After Exit** is the percentage of adult participants who are in unsubsidized employment, during the second quarter after program exit. (PY 2025 expected percentage for Adult is 71%)
5. **Median Earnings – 2nd Quarter After Exit** represents the median earnings of

participants in unsubsidized employment during the second quarter after exit. (PY 2025 expected median earnings for Adult is \$7,350)

6. **Employment Rate – 4th Quarter After Exit** is the percentage of adult participants who in unsubsidized employment, during the fourth quarter after exit from the program. (PY 2025 expected percentage for Adult is 69%)
7. **Effectiveness in Serving Employers** measures the percentage of participants who were employed by the same employer in the second and fourth quarters after exit. (PY 2025 is currently a tracking measure)

Performance measures are negotiated every two years with USDOL and are subject to change in subsequent funding years. Performance targets for PY 2026 may differ from those listed above for PY 2025. Failure to meet performance measures may result in corrective action and/or loss of funding.

Deliverables/Reporting Requirements

Documentation entered into the management information system (EmployMT) will track most required data elements, but Subrecipients may be required to submit additional information in the form of progress, quarterly and financial reports when requested. Subrecipients must submit reports in a timely manner and in the format requested by WSD. WSD reserves the right to modify reporting templates to align with current evaluation needs.

WSD may use the information contained in reports for the following purposes:

- To evaluate the effect of the program on individual income, financial independence, and other matters consistent with the purposes of WIOA.
- To provide non-personally identifiable information to the State Workforce Innovation Board (SWIB), federal partners, and other workforce stakeholders regarding program operations and outcomes.
- For audit purposes, including department reviews and federal auditors.
- For program compliance purposes related to corrective action, sanctions, funding allocations, special projects/initiatives, and all other program management purposes such as but not limited to technical assistance and training opportunities.

Monitoring / Corrective Action / Sanctions

WSD will conduct a risk assessment on each Subrecipient for financial capacity, program staff as well as prior performance each subsequent year for the duration of the lifetime cycle of the grant, in accordance with state policy.

WSD conducts regular oversight and monitoring of WIOA Title I programs to ensure compliance with WIOA provisions, laws, and regulations. The monitoring and audits process also provides an opportunity to strengthen and continuously improve workforce development programs and processes.

If WSD finds fiscal or programmatic noncompliance, staff will recommend corrective action to secure prompt compliance. Corrective action is supported through technical assistance and the operator's timely follow-through. The State Workforce Innovation Board (SWIB) holds the authority to determine whether service provider deficiencies warrant sanctions and to impose

them. **Attachment - SWIB Sanction Policy**

I. APPLICANT SUBMISSION

In order to enable WSD to determine the capabilities of an offeror to perform the services specified in the Competitive Grant Award opportunity, the offeror shall respond to the following regarding its ability to meet the State's requirements.

Each item must be thoroughly addressed. Applicants taking exception to any requirements listed in this section may be found to be nonresponsive or be subject to point deductions. To be eligible for consideration, an applicant must meet all mandatory requirements noted herein. The State will determine whether an applicant's response complies with the requirements. Applicants that fail to meet any mandatory requirements listed in this Competitive Grant Award process will be deemed non-responsive.

Offerors Must:

- a. Indicate if applying for the Adult Program
 - Determine Local Area 1, 2, or both (separate applications required)
 - Determine MACo District(s)

Formatting Requirements

Offerors should adhere to the formatting requirements:

- a. Organize the response into sections that follow the format
- b. Each response must begin with the heading, question number/letter and question followed by the offeror's written response
- c. Font size: 11 point
- d. Font: Arial
- e. Margins: At least one inch
- f. Language: English
- g. All pages numbered
- h. All attachments labeled

Cover Page, Table of Contents, and Executive Summary

1. Cover Page

- a. Include company name, address, phone number, website and federal tax identification number;
- b. Include funding opportunity name; and
- c. Include name of the person authorized to negotiate the award and make decisions for the organization including the phone number and e-mail address.

2. Tables of Contents

- a. Include a clear identification of the material in the response by section and by page number.

3. Executive Summary
 - a. One-page Executive Summary

The Completed Application Will Include

- Cover Page
- Tables of Contents
- Executive Summary
- Company Profile and Experience
- Ability to Meet Scope of Services
 - Program Description
 - Statement of Work
- Staffing Plan/Resumes
- References
- General Requirements
 - Offeror's Financial Stability
 - Offeror's Internal Control Assessment
- Cost Proposal
 - Program Operating Plan (POP) for each MACo district applying for

II. OFFEROR QUALIFICATIONS

Company Profile and Experience

WSD is interested in your agency's current experience. Offerors (including any sub-subrecipients/joint offerors) must have experience providing services similar to those outlined in the Scope of Service to be considered qualified. WSD expects the Subrecipient to provide the personnel necessary to complete the Scope of Service. Provide the following information:

1. A detailed description of the organization including:
 - a. Primary source of business
 - b. Organizational structure and number of employees
 - c. Years of experience performing services similar to those described within this Competitive Grant Award process, including:
 - When the experience occurred
 - Location where it occurred
 - The customer for whom the services were provided
2. Specific operational details as to how your agency will meet the requirements of the Competitive Grant Award opportunity, including:
 - a. How services will be provided to the communities within the local area, including on-site services in remote areas and on reservations
 - b. Office locations
 - c. Hours of operation
 - d. Location of employees
 - e. Virtual service strategies

3. Describe the qualifications and experience of your staff who will be directly responsible for delivering WIOA services. Include:
 - a. An organization structure displaying the relationship of each team member (including any sub subrecipients/joint applicants).
4. How will you ensure your staff remain up to date on emerging trends and best practices for workforce professionals in career development and case management?
5. The subrecipients will be held accountable to meet performance measures and goals:
 - a. Describe the offeror's success in meeting the required WIOA core performance measures of employment attainment and retention, high wage earnings, credential attainment, and measurable skill gains for program participants. If possible, provide actual past performance measures that reflect ability to meet the required WIOA core performance measures.
 - b. Describe how the offeror ensures that performance standards and goals are met.
6. The subrecipients must utilize WSD's management information system, EmployMT, as their participant tracking system.
 - a. Describe the offeror's experience with management information systems.

Ability to Meet Scope of Services

The following questions are designed to assess the Offerors' capacity to deliver a high-quality and effective Adult Program in Montana. By providing detailed and informative responses, offerors can demonstrate their qualifications and commitment to achieving positive outcomes for program participants and the Montana workforce. Refer to the Scope of Services section when answering your questions below.

Program Description

- a. Provide a summary description of the proposed project along with projected activities/goals/outcomes desired for the program.
- b. Identify Local Area 1 or 2 and what MACo district(s) to be served. Describe the target population to be served as well, including rural areas and reservations when necessary.

Statement of Work

Applications must include a Statement of Work detailing all aspects of the proposed project design. The Statement of Work should describe how requirements will be met and outline the process for achieving WIOA Performance Outcomes. Address the following components and describe how they will be carried out:

1. Describe how your organization will manage the eligibility and enrollment process for the Program.
 - a. Describe how you will ensure that all participants enrolled are eligible and appropriate for WIOA services.

- b. Please include information about adequate staff training and supervision related to the eligibility and enrollment process, as well as your approach to ensuring staff remain current on workforce development's best practices.
 - How will initial training be delivered to new staff, and what is your plan for ongoing professional development?
 - Include details on the following:
 - Training content and methods.
 - Frequency of continued training and refreshers.
 - How will you ensure consistency in training across all offices.
 - Strategies for monitoring staff competency and incorporating updates based on policy changes or emerging trends.
 - c. Describe the customer assessment process. Include a description of any tools or methods used to determine the following: levels of basic skills, work readiness skills, interests and aptitudes, occupational skills, and supportive service needs. Explain how assessment results inform participants' service strategies.
 - d. As an offeror, explain how staff will be trained to identify candidates to support participants in achieving their long-term, sustainable career goals. In addition, describe how the development of the Individual Employment Plan will be conducted and how it will be maintained to reflect the participants' goals around education and employment.
2. Outline your comprehensive plan for delivering Program services. Detail the specific services offered, participant assessment methods, and strategies for addressing individual needs and barriers to employment.
- a. Describe how the offeror will deliver WIOA Basic, Individualized and Training Services throughout the area served, including rural areas and reservations.
 - b. Describe the procedures the offeror will use to determine the establishment of an Individual Training Account (ITA). Describe how an assessment of the appropriateness of a particular training goal will be determined. Please also describe how the funding amount of the ITA will be determined and managed, including co-enrollment and cost sharing with other WIOA and non-WIOA programs when appropriate.
 - c. Describe the procedures the offeror will use to determine the suitability and development of work-based learning opportunities, including Registered Apprenticeship, On-the-Job (OJT) Training, Customized Skills Training, Work Experience, internships and others. Include: How you will identify participants who are good candidates for work-based learning:
 - How will you work with apprenticeship sponsors and employers?
 - How will you support participants through the early stages of On-the-Job Training, Work Experience and apprenticeships to improve retention?
 - d. Describe your strategy for accelerating reemployment; include timelines for participant engagement within the first 30 days, and strategies for participants not placed within 60 days.

3. Describe how you will serve large numbers of varied participants who will receive career services within an integrated service delivery system. In your response, discuss any best practices or challenges in serving participants, partnerships, and collaborations in place, or those that are needed to provide outreach and recruitment for service delivery, along with strategies/plans for serving participants with barriers to also include:
 - Veterans and eligible spouses.
 - Marginalized workers out of the labor force, including parents facing barriers associated with childcare and workers with disabilities.
 - Participants pursuing apprenticeships or other work-based learning.
 - Workers utilizing public supports, who would benefit from upskilling into higher-paying jobs.
 - Participants with limited English proficiency.
 - Participants with disabilities.
 - Dropouts.
 - Low-income participants.
 - Persons with limited literacy skills/basic skills deficient.
 - Ex-Offenders and formerly incarcerated participants.
 - Highly skilled job seekers.
 - a. Specifically describe the geographical area to be served, including rural communities, and reservations.
 - b. Include how you know this approach is effective, using data as supporting evidence (e.g. past performance with ex-offenders participants, veterans or apprenticeships)
 - c. Describe your plans for outreach and recruitment activities throughout the entire area served.
 - d. How will you ensure eligible participants have access to your services without imposing additional barriers? Address transportation, technology, scheduling/office hours, and other barriers preventing program participation.
4. Describe any innovations and strategies that have been found to increase the likelihood of success for participants to include motivation and support to maintain engagement of participants. Include innovative strategies you propose to enhance service delivery and address emerging workforce needs in Montana, including the use of AI skill-building within client services.
 - a. Adaptability: How will you adapt your program to individual participant needs and changing economic conditions, such as employing the USDOL AI Literacy Framework to prepare clients for AI in the workplace?
 - b. Career pathways and 406 JOBS alignment: Describe how you will guide participants toward sustainable career pathways and educational programs that align with 406 JOBS Initiative and America's Talent Strategy and reflect the skill needs of industries that are important to the economies in the area you serve.
 - c. Provide a step-by-step outline of participant flow (and retention), from enrollment to placement; include timeline expectations for resolving barriers.

5. Describe how your organization will manage the provision of WIOA-funded occupational skills training services for the Adult Program. Include specifics about determining a need for training; assisting the customer to select an appropriate occupational sector; developing a comprehensive individual employment plan to include the training services, financial aid, and management of the ITA process. How are career pathways included in the training process?
 - a. How will your program identify occupational career goals and training program opportunities that are industry-demanded and associated with high-wage jobs.
 - b. How will your program provide ongoing employment support such as resume development, interview preparation, and barrier reduction while participants are engaged in training and skill development?
 - c. Additionally, outline how you will incorporate innovative practices and local resources to promote worker mobility and employer engagement, consistent with 406 JOBS and America's Talent Strategy as well as its five strategic pillars. Provide details of how you will ensure that training service selection is industry driven.
6. Describe what you see as workforce, economic, and educational training needs or challenges for the proposed service area.
7. Describe strategies that will ensure services are aligned with current local and regional labor market demands by connecting and meeting the needs of employers in the area served. Please also identify in-demand occupations for the area utilizing the 406 JOBS high-demand industries.
 - a. Describe approaches to connecting participants with apprenticeship and other work-based learning opportunities in local areas, while also delivering training that yield in-demand industry recognized credentials.
 - b. Describe how offerors will help employers understand incentives, risk mitigation strategies, and supports available when hiring participants served through the program?
8. Explain your strategy and plans for collaborating with other WIOA Core Programs/Partners, One-Stop Centers, workforce development organizations, educational institutions, community organizations, and employers within Montana to deliver activities and program services for program participants.
 - a. How will these partnerships enhance service delivery and participant outcomes?
 - b. Describe any formal agreements (MOUs, data sharing, referral protocols) that will support coordinated service delivery.
9. How will your organization ensure it can adapt to shifting WSD or SWIB directives including changes to eligibility, training service availability, or targeted grant priorities and maintain full compliance while continuing to deliver all required activities and services to enrolled participants?
 - a. How will you ensure timely implementation of new federal, state, or local guidance that affects service delivery or participant eligibility?
 - b. What internal controls or communication systems do you use to ensure staff receive and act on updated requirements without delay?
 - c. Explain how your organization will coordinate with WSD to stay aligned with evolving workforce initiatives and expectations.

- d. Describe how you will ensure all required activities and services are available to enrolled participants, even when program priorities shift. How will you verify that staff consistently deliver services in accordance with updated policies and program standards?

10. Describe how engaging with business and industry relates to the success of services for adult workers.

11. Summarize continuous improvement procedures that will be used to obtain feedback from participants, employers, and other appropriate parties about the responsiveness and effectiveness of the training and services provided.

12. Demonstrate how your proposed approach will meet federal performance measures and continuously monitor and improve program delivery and performance.

- a. Your response must be based on evidence of success by providing past outcomes and other accomplishments that validate your approach.
- b. How will you utilize data analysis to identify areas for improvement and adapt your services to specific populations and geographies?
- c. Demonstrate how your proposed approach will meet federal performance measures of employment, high wages, credential attainment, and skills gains and contribute to achieving positive outcomes for WIOA participants and the Montana workforce.
- d. If your organization is currently operating a program, briefly describe/compare current outcomes to proposed goals. Is it on track to be successful?

13. Include any additional indicators of success not previously mentioned. This may include any in-kind support, special projects, previous program highlights that support service delivery, partnerships, awards, trainings, etc., that may benefit the organization in providing WIOA services.

Staffing Plan/Resumes

A resume or summary of qualifications, work experience, education, and skills must be provided for all key personnel, including any subrecipients, who will be performing any aspects of the award execution. Include years of experience providing services similar to those required; education; and certifications where applicable. Identify what role each person would fulfill in performing work identified in this Competitive Grant Award process. Attach resume or summary of qualifications.

References

Provide at least two (2) but no more than eight (8) corporate, professional letters of recommendation within the service region for which the offeror is applying, that are currently partners or have previously partnered, preferably within the last two (2) years, with the offeror's workforce services similar in type to those proposed in this Competitive Grant Award process. Include the company name; contact person(s), telephone number, and e-mail address; location where the services were provided; a complete description of the services provided; and dates of

service. These references may be contacted to verify offeror's ability to fulfil the award agreement. The State reserves the right to use any information, additional references, or investigation deemed necessary to establish the ability of the offeror to fulfil the agreement.

General Requirements

1. Offeror's Financial Stability

Offerors shall demonstrate their financial stability to provide services as described in this Competitive Grant Award process by:

- a. Providing financial statements, preferably audited, for the two (2) consecutive years immediately preceding the issuance of this Competitive Grant Award process.
- b. Providing copies of any quarterly financial statements that have been prepared since the end of the period reported by its most recent annual report.
- c. Describe offeror's federal grant management experience.
- d. Describe offeror's Financial Management System.
- e. Describe the offeror's ability to produce required reports including information pertaining to contract award management, obligations, unobligated balances, assets, expenditures, and income.
- f. Describe the offeror's ability to compare actual expenditures to budgeted amounts.
- g. Describe the offeror's process to secure supporting source documentation for accounting records.
- h. Describe the offeror's ability to ensure accurate charging of costs to appropriate program funds, as well as the allocation methodology used when charging costs against multiple program funds.

2. Offeror's Internal Control Assessment

Offerors shall provide:

- a. A copy of the most recent independently conducted internal control assessment. This assessment should include review of accounting systems, IT security systems, and other transaction-based processes.
- b. An internal policy for ensuring these reviews is conducted on a regular schedule.
- c. Describe the offeror's ability to fiscally manage and administer programs in compliance with federal, state and local laws, regulations, and policies.
- d. Include 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.

Cost Proposal

Offerors must provide an estimated budget for managing the program for each MACo district they plan to serve.

The proposed budget must not exceed the projected available funding for each MACo district as identified in the chart in the funding section of the Scope of Services. The amounts shown on that page are intended as guidelines and are subject to revision based on final notification of

WIOA funding availability from MTDLI and WSD; and at the close of the current fiscal year. The Program Operating Plan document will provide a summary of your proposed costs by line item. If additional narrative details are needed, please provide them as well. It is understood that participant expenses will be difficult to accurately predict at this time; however, a projection of these expenses based on plans for services to participants is requested. More detailed budgets will be developed after the service provider is selected and allocation amounts are more defined.

Proposed budgets must be within the amounts indicated and must be reasonable based on proposed staffing, service levels, and service delivery plans. The amount awarded will be determined on a competitive basis but not necessarily based on the lowest proposed cost. Subsequent revisions and negotiations of final budgets may be required due to funding award decisions.

Since this is a reimbursement award, subrecipients will be expected to incur the costs for all program services and make payments on behalf of the enrolled participants, reporting monthly for each of the fund sources in the award. The monthly reimbursement submission will include a line-item invoice, with budgets, current month expenses, and unexpended balances. As a backup to an invoice, a summary of line-item expenditure report and detailed line-item expenditure reports by fund source supporting the invoice amounts should be submitted each month. WIOA funds are distributed through a process of drawdowns from the US Department of Labor (USDOL) to the state. Since this is a reimbursement process, the time from incurred expense to receipt of reimbursement may take up to 30 to 60 days. Bidding organizations must have the fiscal ability to operate under this timeframe.

The program year and fiscal year run from July 1st through the following June 30th. Final payment for each program year's WIOA expenses will occur with the June invoice submitted by the service provider to WSD fiscal during the month of July, along with the end-of-year Financial Closeout documents. Service providers are expected to meet, but not exceed, awarded amounts for each program year.

Although not expected, if any part of the work covered by this request is to be sub-granted, the grantee shall identify the sub-granting organization, and a sub-grant agreement. The two parties must enter into an agreement. Copies of the sub-grant agreements must be submitted to the SWIB and WSD fiscal for approval prior to execution of the agreements.

Program Operating Plan (POP)

1. Program Operating Plan (POP) Budget

Submit a proposed Program Operating Plan (POP) Budget based on the funding proposed in the MACo district your agency plans to serve. Use **Attachment – Program Operating Plan** to present estimated budget expenditures on program operations, career services, and training services. Submit a separate POP for each MACo District if you are applying for more than one MACo District.

2. Program Operating Plan (POP) Narrative and Participants Served

Submit a budget narrative and participants served based on the funding received in the MACo district your agency plans to serve. Use **Attachment – Program Operating Plan** that describes planned activities for each line items, total number of participants served, and total budgeted amount.

NOTE: Submit a separate POP for each MACo District if you are applying for more than one MACo District in Local Area 1 or Local Area 2.

Montana is separated into two local areas. Applications to combine local areas will not be considered as funds are specific to local area, according to federal regulations. An offeror applying to provide services within more than one local area must submit one response per local area. General requirements will be evaluated, and local area specific requirements will be evaluated separately.

I. EVALUATION

Basis of Evaluation

The evaluation committee will review and evaluate the offers according to the following criteria based on a total number of **600** points.

Offeror's General Requirements (Financial Stability and Offeror's Internal Control Assessment) portions will be evaluated on a pass/fail basis.

Company Profile and Experience, Ability to Meet Scope of Services, Staffing Plan/Resumes, References, and Cost Proposal portions will be evaluated based on the following Scoring Guide.

Any application that fails to achieve at least **60%** of the total points available or receives a "fail" for any individual evaluation criteria, may result in disqualification at the discretion of the review committee.

Scoring Guide

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

Superior Response (95-100%): A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the Competitive Grant Award process. In addition, the response may cover areas not originally addressed within the Competitive Grant Award process and/or include additional information and recommendations that would prove both valuable and beneficial to the agency.

Good Response (75-94%): A good response clearly meets all the requirements of the Competitive Grant Award process and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the Competitive Grant Award process. The offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the Competitive Grant Award process. The offeror has not demonstrated sufficient knowledge of the subject matter.

Evaluation Criteria

Evaluated Competitive Grant Award Process Section	Point Values
Company Profile and Experience	20% of points possible
1. Description of the organization	20 points
2. Operational details to meet the requirements	20 points
3. Qualifications and experience of staff	15 points
4. Staff remain up to date on trends and best practices	25 points
5. Meet performance measures and goals	25 points
6. Experience with management information systems	15 points
Ability to Meet Scope of Service	50% of points possible
1. Approach to managing the eligibility and enrollment process	15 points
2. Comprehensive plan for delivering program services	34 points
3. Approach to serve participants	25 points
4. Innovative strategies to improve success	30 points
5. Providing training services	25 points
6. Workforce, economic, and educational training needs	15 points
7. Strategies that will ensure services are aligned with LMI	25 points
8. Strategy and plan for collaborating with partners	25 points
9. Adapt to shifting WSD or SWIB directives	12 points
10. Engaging with business and industry	34 points
11. Continuous improvement procedures	12 points
12. Demonstrate approach to meet federal performance measures	36 points
13. Additional indicators of success	12 points
Staffing Plan/Resumes	5% of points possible
Staffing plan and resumes	30 points
References	5% of points possible
2-8 References	30 points
General Requirements	Pass/Fail
1. Financial Stability	
a. Audited financial statements	P/F
b. Quarterly financial statements	P/F
c. Federal grant management experience	P/F
d. Financial management system	P/F
e. Ability to produce reports	P/F
f. Ability to compare actual expenditures to budgeted amounts	P/F
g. Ability to secure supporting source documentation	P/F

h. Ability to ensure accurate charging of costs	P/F
2. Internal Control Assessment	
a. Internal control assessment	P/F
b. Internal policy	P/F
c. Fiscally manage and administer programs	P/F
d. Audit/monitoring compliance	P/F
Cost Proposal	20% of points possible
1. Program Operating Plan (POP) Budget	60 points
2. Program Operating Plan (POP) Narrative and Participants Served	60 points
Equal Pay for Montana Women EO 12-2016 Applicants who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Select 'Yes' in Submittable to agree and certify compliance.	5% total points possible

II. Referenced Attachments

- Attachment – WIOA Glossary of Terms and Definitions
- Attachment – WIOA.49 Form
- Attachment – SWIB Sanction Policy
- Attachment – Program Operating Plan (POP)
- Attachment – Federal Terms and Conditions
- Attachment – General Requirements

III. Other Resources

- [Workforce Innovation Opportunity Act](#)
- [State Workforce Innovation Board](#)
- [Montana DLI Workforce Services Division](#)