

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

## Schedule of Events

Event	Date
Competitive Grant Award Opportunity Issued	May 7, 2026
Pre-Submission Conference	May 15, 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)
Responses 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 from May 15, 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-Submission Conference \(WIOA Title I - Youth Program Services\) | 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](mailto:MTDLI_WIOA@mt.gov) and label the subject line Title I – Youth Program Services.

## Submission of Application

MTDLI must receive responses no later than **June 8, 2026, 11:59 p.m. (MST)**. **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](mailto:MTDLI_WIOA@mt.gov) and label the subject line Title I – Youth Program Services.

To submit a response, click on this 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 - Youth 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 Youth 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.

By providing comprehensive workforce activities within a one-stop delivery system, the Youth Program is designed to provide comprehensive interventions that support the attainment of a secondary school diploma or its recognized equivalent, offer opportunities for skills training (i.e. pre-apprenticeship, occupational skills training, and work experience), and culminate with employment, enrollment in postsecondary education, or apprenticeship.

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:

1. **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.
2. **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.
3. **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.

4. **Accountability** – Ensuring federally funded workforce programs deliver measurable results by linking investment to outcomes and delivering strong performance outcomes.
5. **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 exit 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](#)

## II. SCOPE OF SERVICES

### Program

This Competitive Grant Award opportunity specifically targets the WIOA Youth Program which provides a range of services to help young people prepare for successful careers. Priority is given to low-income youth and those with barriers to employment.

The program focuses on two key groups:

- In-School Youth (ISY): This group includes youth aged 14-21, currently enrolled in school, are low-income and have one or more barriers as defined under WIOA.
- Out-of-School Youth (OSY): This group includes youth aged 16-24 who are not currently enrolled in school, have one or more barriers as defined under WIOA and may face challenges entering the workforce.

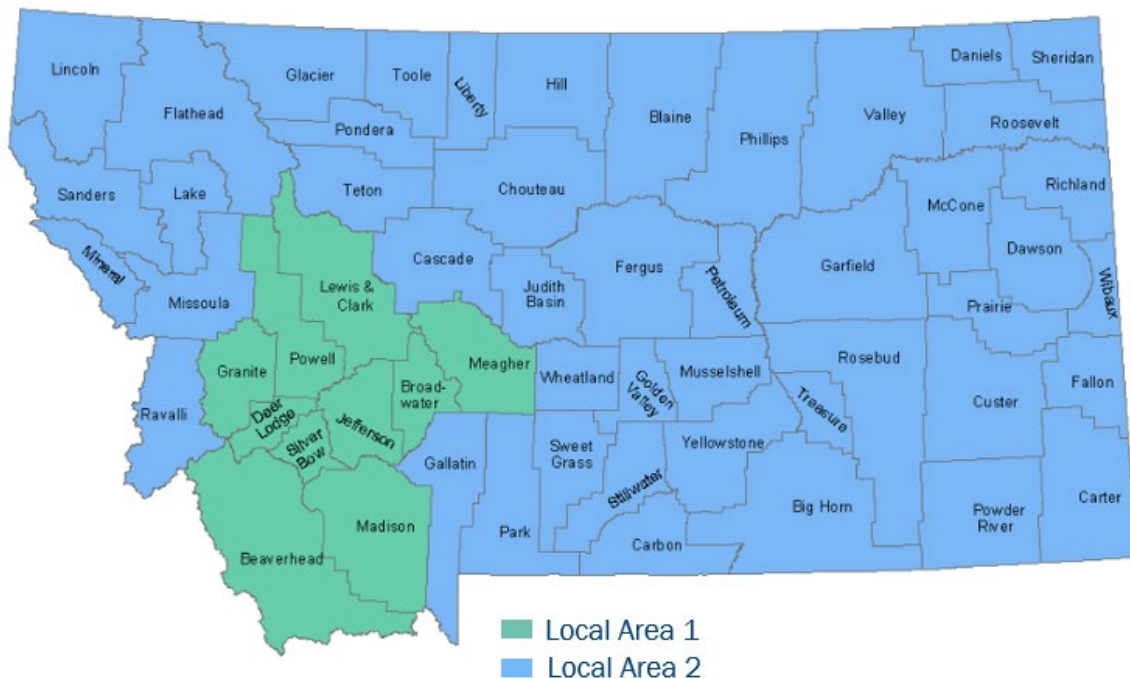
[TEGL 21-16](#) and [TEGL 21-16, Change 1](#) provides guidance on services provided through the WIOA Youth Program. **Attachment - WIOA Glossary of Terms and Definitions** includes a variety of categories of participants who qualify as a youth participant.

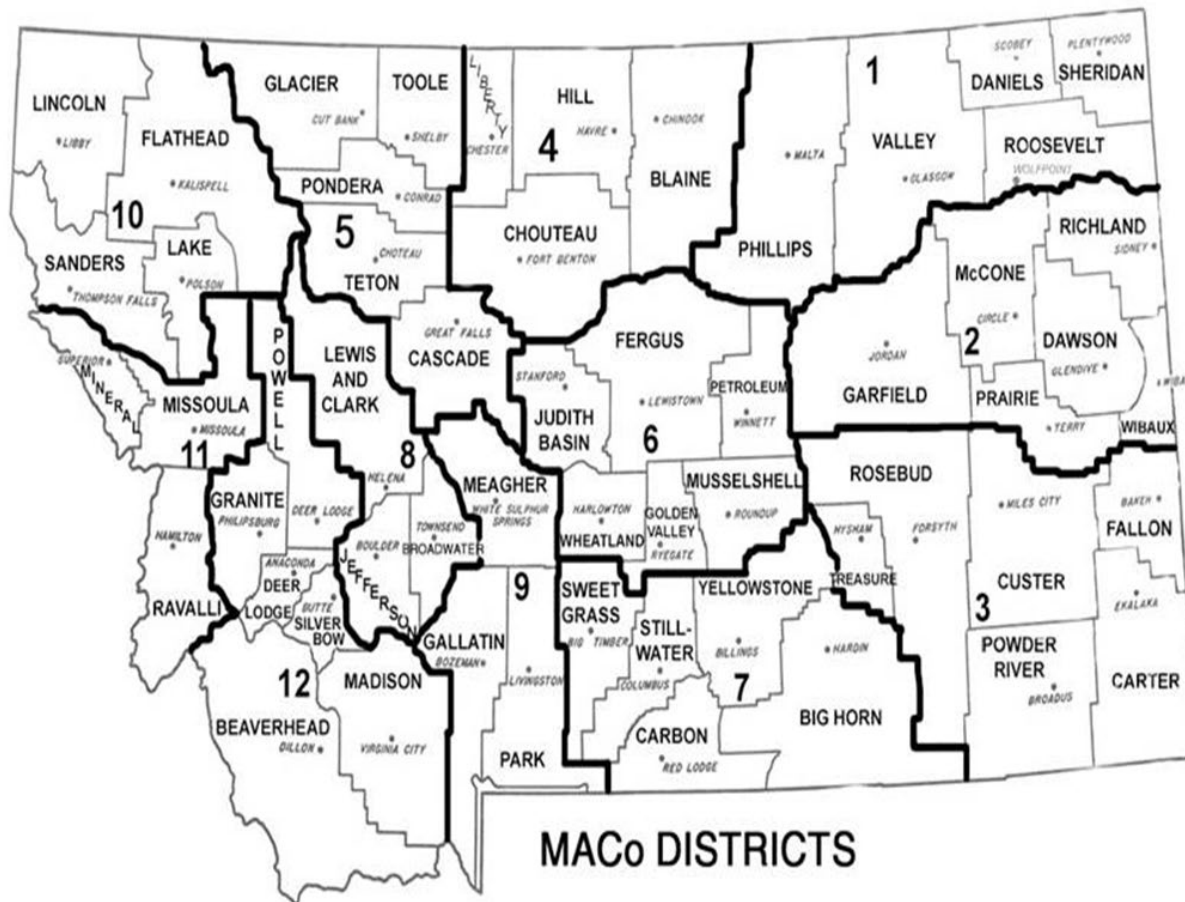
## Geographic Coverage

If applying for the Youth 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 the purpose of this Competitive Grant Award opportunity, Montana is separated into 12 MACo districts.

The goal is to provide meaningful workforce development services to as many youth participants across the state as possible while prioritizing maximum direct-to-participant dollars.





MACo DISTRICTS

Offerors must indicate which population they intend to serve: In-School Youth (ISY), Out-of-School Youth (OSY), or both populations. If an offeror chooses not to serve a particular population, they must address where that population is expected to receive services that meet their educational and employment needs within the community they are applying for.

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-recipients, 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 that work with youth, and have strong employer partnerships.

**Funding**

Offerors will request funding at a level required to meet programmatic performance levels within their selected area, to serve the proposed number of participants listed in their application, while staying within financial limitations described within this Competitive Grant Award process.

An approximate total of **\$1,799,798** will be awarded with this Competitive Grant Award funding

opportunity. Cost per participant may not exceed \$7,500. For example, a subrecipient that receives \$75,000 must serve no fewer than ten youth but may serve more than ten.

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
\$200,327	\$1,599,471

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	\$91,689
District 2	\$68,219
District 3	\$86,457
District 4	\$98,124
District 5	\$221,210
District 6	\$63,720
District 7	\$291,256
District 8 (Local Area 1)	\$89,457
District 9	\$172,359
District 10	\$242,588
District 11	\$263,849
District 12 (Local Area 1)	\$110,870

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 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 statewide. Montana’s One-Stop Operator has been 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 the Youth Program within the designated One-Stop Center (Great Falls Job Service-MACo District 5) to provide youth services at the One-Stop Center. The offeror of the other 11 MACo districts should be partnering with Job Center 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

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

### 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. Youth 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.

Youth services from outreach through follow-up services:

- **Outreach, Engagement, and Service Delivery:** Subrecipients must take a proactive approach to find and engage appropriate participants who will benefit from education, training, and employment support to explore, plan, and reach employment goals. The Youth Program can serve both In-School Youth (ISY) and Out-of-School Youth (OSY). Subrecipients must have strategies to identify and engage participants from the population(s) they indicated as serving. Delivering in-person services is recommended, but subrecipients must also have developed a way to provide services remotely due to Montana’s widespread geography. 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 service area is required. Alternatives may include meeting participants closer to their home, school, or work location and/or providing virtual or remote opportunities.
- **Eligibility, Intake, and Assessment:** Youth services may only be provided to participants who meet eligibility criteria. Eligibility is outlined in the WIOA Youth Program [WSD Policy](#).

WIOA requires a thorough and in-depth assessment of the academic level, skill levels, and service needs of each youth at the time of enrollment into WIOA activities that help develop the sequence of services and interventions. Initial/entry assessment will include basic skills, work readiness skills, occupational skills, prior work experience, barriers to employment, family situation, occupational interests and aptitudes, financial resources and needs, supportive service needs, and developmental needs.

This information should be acquired through various means, including, but not limited to, standardized tests, structured interviews, behavioral observations, inventories, career guidance instruments, performance-based or competency-based assessment tools, and where the information is current and reliable, assessment results from another service provider (school or agency). Subrecipients must conduct Follow Up, as appropriate, to track progress and update service delivery plans.

Subrecipients will determine which participants are appropriate for the Youth Program, and quality screenings and assessments—designed to identify academic and

occupational skills, abilities, preferences, and needs—play a key role in this process

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

- **Exploration, Planning, and Enrollment:** 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 be able to effectively use labor market information to ensure career exploration results in the identification of career pathways that lead to in-demand high-paying jobs. Additionally, it is expected that subrecipients can effectively assist participants in exploring how skills and abilities transfer across careers to assist participants in the quick identification of potential career pathways that translate well from existing skills and abilities.

Each youth enrolled will have an individualized plan of services and activities, including appropriate learning objectives and goals, based on the entry assessment information. Service plans should be flexible and responsive to the changing needs of the youth as they move through WIOA and should be updated at least every six months.

Each plan will identify educational goals that lead to credentials, selected learning objectives, work-based learning (when provided), and provide preparation for unsubsidized employment. The plan will set clear and realistic goals for educational advancement, entry into employment in a targeted industry, and continued learning and development. Service Plans should be developed and updated in EmployMT.

- **Implementation:** Enrolled youth will work on their individual service strategy with the assistance and support of their career coach. Ongoing meetings to evaluate progress, amend tasks, and document milestones are essential. Career Coaches are expected to work closely with youth to provide support and guidance, address needs and barriers,

solve problems, serve as role models, and assist in the attainment of the objectives and goals agreed upon in their plan. Youth should be aware that they have support and accountability in working to achieve their personal goals. Skilled career coaches know when to offer additional assistance and when to support the youth to solve problems with their own solutions while using their own resources and/or locating resources. Celebrating progress and success is an impactful way to reinforce the meaning behind hard work and motivates youth to build self-esteem to take the next step and work towards achieving the next task. Primary case management functions include services coordination, advising and counseling, advocacy, follow-up, and accurate and timely record keeping. Career Coaches are to be informed of and adhere to professional standards of client confidentiality and safeguarding of personal and confidential information.

- **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 résumé 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.
- **Follow-up Services:** Follow-up services for a minimum of one year are required for all youth finishing their individual service strategy plan. Services during follow-up may include supportive services, adult mentoring, financial literacy education, labor market and employment information, and activities that help youth prepare for and transition to postsecondary education/training. Follow-up services are intended to provide support and increase the likelihood of positive outcomes as well as obtain participant outcome data such as employment, wage, and credential attainment performance data.

Montana’s workforce ecosystem is always evolving. Subrecipients will be required to work in coordination with WSD as expectations may shift focus based on new initiatives, directives, or federal guidance. Subrecipients are expected to adjust accordingly and maintain compliance when directives change.

### 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 are effectively filling Montana’s talent shortages. Offerors must be able to work with employers to understand and identify the skills and competencies that training must address.

It is critical that subrecipients develop relationships with local Montana business and industry to ensure an understanding of the local labor market needs that their program participants can prepare for. Subrecipients should have experience reaching a variety of businesses using a variety of methods and participate in local sector partnerships that represent high demand sectors in their service areas.

An established working relationship builds collaborative solutions to meet business needs. Subrecipients must be skilled at customizing specific solutions to business needs by utilizing a variety of resources and service strategies, including on-the-job training and other work-based learning methods. Successful offerors should have experience working 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 other community partners. Subrecipients must be capable of adapting to changing needs of their participants and communities. Measurable improvement in desired outcomes is the goal.

## Partnerships

Successfully providing Youth 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 Youth 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.

This Competitive Grant Award process is intended to foster collaboration. WIOA is one of many programs providing workforce development services and support to Montanans. Budget limitations may prevent successful offerors from providing necessary supports to youth or to the quantity of youth who need assistance.

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

### Youth Program Services

The focus of the youth formula-funded program under WIOA is placed heavily on out-of-school youth, work-based learning opportunities, educational opportunities, and additional program elements. The structure of the program is designed so that each youth receives an objective assessment and an individual service strategy with the objective to prepare youth for postsecondary education and/or employment. Responses should include innovative ideas along with integration and partnerships to carry out the program.

WIOA legislation calls for Youth Programs that focus on the following:

- Significantly increased services to out-of-school youth ages 16-24.
- High school dropout recovery.
- Achievement of recognized post-secondary credentials.
- Career pathways and work-based learning are tied to a systematic approach that offers youth a comprehensive set of service strategies.
- Closer linkages to the local labor markets.
- Required connections between WIOA-funded Youth Programs and the one-stop system providing information on the full array of appropriate services that are available to youth.

It is important to note two requirements with respect to WIOA Youth Programs:

1. At least seventy-five percent (75%) of WIOA youth funds must be expended on providing workforce investment activities and services for out-of-school youth (unless local waiver is received).
2. At least twenty percent (20%) of total allocated WIOA youth funds must be expended on paid or unpaid work based learning activities that have as a component academic and occupational education for both in-school and out-of-school youth, which may include the following: employment opportunities such as work experiences during the summer and throughout the school year; pre-apprenticeship programs; internships and job shadowing; and on the job training.

**NOTE:** Montana received a waiver from USDOL regarding the flexibility of the OSY expenditure requirement, by reducing it to 50%. This, in turn, allows more enrollments/expenditures on in-school youth. Montana is reapplying for the waiver, as this funding opportunity has been released. If not, the required amount will be 75% of funds allocated to youth services must be spent on OSY.

Offeror responses should reflect “an age continuum of services” and age-appropriate activities based on the expectation that youth may be enrolled in WIOA services for a duration needed to successfully complete their service strategy. If choosing to serve both populations, planned services and activities should be designed to meet the needs of both ISY and OSY.

The intensity and methods of delivering WIOA services should be flexible enough to respond to the individual needs of youth as they age and develop. A variety of workforce development activities should be available to help youth identify personal and vocational interests and begin to clarify long-term employment goals. Negotiating the transition from school to the workforce requires more than the acquisition of skills specific to an occupation. It is also necessary for youth to master the developmental tasks associated with cognitive, emotional, and social maturity that are critical to long-term employment success.

Many young adults who are disconnected from education and employment may demonstrate a need for supportive services to successfully begin, carry out, or complete their service strategy. Subrecipients should collaborate with partner agencies on meeting these needs prior to the use of WIOA funds. Common types of supportive services include childcare, transportation, and emergency assistance.

Responses should demonstrate linkages with the public schools, alternative schools, and various training providers to extend and enhance learning opportunities as part of a year-round strategy to improve academic achievement and build connections between work and learning. Respondents are expected to build and strengthen partnerships with community organizations to effectively recruit, engage, and sustain both in and out-of-school youth in the successful completion of WIOA activities. Organizations should develop a plan that provides outreach to underserved young adult populations in the proposed area(s).

Subrecipients are also expected to assist in workforce system-building activities with education and partners. Activities should include, but are not limited to, partnerships with schools to provide workforce information and resources, assisting with career fairs, hosting workshops, Career Pathways, and the AJC system. Responses should incorporate activities that demonstrate the provider's ability to successfully engage and contribute to the development of workforce services throughout the proposed area(s).

Subrecipients are expected to provide 12 months of follow-up services for all participants. Services must be designed to assist participants in entering and retaining employment or education. Under WIOA measures, successful follow-up is a critical component that should be seen as equally important as services prior to exit.

### Eligibility/Enrollment Criteria

The Youth enrollment process connects participants 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.

Subrecipients will determine eligibility and assist applicants in obtaining necessary documentation. After eligibility criteria are satisfied, subrecipients will determine appropriateness for program enrollment. Veterans receive priority of service for all US Department of Labor employment and training programs, including the WIOA Youth Program. Subrecipients may use youth funds to provide services for out-of-school youth between the ages of 16-24 and in-school youth between the ages of 14-21 that meet the federal WIOA eligibility criteria. Suitability factors should also be considered when deciding to enroll.

To be considered for enrollment, potential participants must qualify for services based on in-school or out-of-school criteria. Work authorization documentation and selective service

registration are also required for enrollment.

- **In-School Youth (ISY):** An individual who is attending school (as defined by state law); between the ages of 14-21; who is low income, and one or more of the following:
  - Individual with a disability;
  - Basic skills deficient;
  - English Language Learner;
  - An offender who:
    - Is or has been subject to any stage of the criminal justice process; or
    - Who requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.
  - Homeless individual, including runaway youth;
  - Youth in foster care, or aged out of foster care;
  - Pregnant or parenting; or
  - Requires additional assistance to complete an educational program or secure and retain employment.
  
- **Out-of-School Youth (OSY):** An individual who is not attending any school, is between the ages of 16 and 24, and exhibits one or more of the following characteristics:
  - A school dropout;
  - A youth who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter;
  - Recipient of a secondary school diploma or equivalent who is a low-income individual and is either basic skills deficient or an English language learner;
  - Offender;
  - Homeless (includes a runaway youth);
  - In foster care or aged out of foster care;
  - Pregnant or parenting;
  - Disability; or
  - Low income who requires assistance to:
    - Complete an educational program; or
    - Secure or hold employment.

Additional details for eligibility can be found in the WIOA Youth policy, located at [WSD Policy](#).

Selected offerors will be expected to continue services with currently enrolled youth participants.

### Enrollment Process

Participants eligible for Youth Program 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 activities to be well matched with In-demand industries and

occupations identified through Montana Labor Market Information.

- Ensure career choices reflect real hiring needs and employment opportunities.
- Development of high-quality individual service strategies supported by an employment goal that is:
  - High wage (as determined by either wages or a career pathway that offers advancement within the career cluster leading to self-sufficient wages).
  - In-demand (as determined by Montana labor market information or identified through a comprehensive employer engagement process).
- Ongoing career coaching and support appointments with a career coach during enrollment includes:
  - Tracking progress toward career goals.
  - Assess supportive service needs, training and/or work-based learning.

### Activities and Services (14 Youth Elements)

It is the goal of MTDLI's youth services to provide activities to enable youth to be work-ready and prepared for their future. Provided services will help youth access opportunities for work-based learning, complete industry-recognized credentials, and enter employment in demand occupations. Offerors' youth services should be designed in a manner that integrates young adults in order to receive the full range of services. Integration with other program staff, such as the adult program for referrals and with business services for work-based learning and connections with employers, will be necessary to meet expectations.

WIOA requires the following fourteen (14) program elements to be available to support the success of youth. While every enrolled youth may not need every element, providers are required to either provide or connect youth to organizations that meet their identified needs.

Subrecipients must directly deliver elements 3, 7, 9, and 13, at a minimum. In addition:

- At least one of the 14 elements must be provided at the time of enrollment for the youth to be counted as enrolled.
- At least one of the 14 elements needs to be provided every 90 days based on the youth's individual service strategy.

The 14 Youth Program Elements (see **Attachment - 14 Youth Program Elements** for more details:

1. Tutoring, study skills training, instruction leading to the completion of secondary school, including dropout prevention services.
2. Alternative secondary school services or dropout recovery services.
3. Paid and unpaid Work Experiences (WEX) linked to academic and occupational education. **(Subrecipient required to directly provide)**
4. Occupational skill training.
5. Education offered concurrently with workforce preparation/training activities for a specific occupation.
6. Leadership development opportunities.
7. Supportive services. **(Subrecipient required to directly provide)**
8. Adult mentoring.
9. Follow-Up Services. **(Subrecipient required to directly provide)**

10. Comprehensive guidance and counseling.
11. Financial literacy education.
12. Entrepreneurial skills training
13. Services that provide labor market information. **(Subrecipient required to directly provide)**
14. Post-secondary education and training transitional activities.

### Additional Allowable Activities and Services

- Youth Incentives: For recognition and achievement in educational, training, and work activities. All incentive payments must follow guidelines outlined in the WIOA Youth Policy.
- Youth Stipends: To encourage and motivate WIOA Youth to participate in certain classroom activities that prepare them for work experience and help them reach specific goals and obtain positive outcomes. All stipends must follow guidelines outlined in the WIOA Youth Policy and Operations Manual.
- Youth ITA's: OSY and ISY can access WIOA Individual Training Accounts (ITA's) for training programs on the Montana Eligible Training Provider List (ETPL). Currently, Montana has an approved waiver to allow in-school youth to access an ITA. Montana is re-applying for this waiver for PY2026; if not approved, ISY access to ITA's may change.

### 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** for a list of activities/services.
- Maintaining the participant file by recording all activities, program services, outcomes, case notes, and documentation in Montana's Management Information System.

Additional information can be found at [WSD Policy](#) and in the [Operations Manual](#).

### Administrative Requirements

#### Case Administration

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

- Enrollment Information
- Eligibility and Appropriateness Documentation
- Participant Intake
- Employment Assessments
- Labor Market Information
- Goal and Action Planning
- Individual Service Strategy
- 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.

Offerors are expected to establish and maintain performance standards that:

- Assure that negotiated performance measures are met or exceeded
- Promote accountability and transparency
- Maximize return on investment of federal resources.

The selected offerors will utilize case management and federal reporting systems as required by WSD, as well as data management systems required for any special grants. The selected offerors will be required to support statewide efforts around implementation for any case management systems, and other data management portals, as well as take part in training about how to use the integrated system.

Core Performance Measures:

1. **Enrollment Goals** are based on submitted responses and final funding available.
2. **Measurable Skill Gains** (MSG) 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 is 42%)
3. **Credential Attainment** is defined as an attainment of a credential defined by 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 is 34%)
4. **Employment Rate – 2<sup>nd</sup> Quarter After Exit** is the percentage of youth participants who are in education or training activities, or in unsubsidized employment, during the second quarter after exit from the program. (PY 2025 expected percentage is 63%)

5. **Median Earnings – 2<sup>nd</sup> Quarter After Exit** is defined as the median earnings of program participants who are in unsubsidized employment during the second quarter after exit from the program. (PY 2025 expected median earnings are \$4,100)
6. **Employment Rate – 4<sup>th</sup> Quarter After Exit** is the percentage of youth participants who are in education or training activities, or in unsubsidized employment, during the fourth quarter after exit from the program. (PY 2025 expected percentage is 58.6%)
7. **Effectiveness in Serving Employers** is the percentage of participants in unsubsidized employment during the second quarter after exit who were employed by the same employer in the second and the fourth quarters after exit. (PY 2025 is currently a tracking measure)

Additional MTDLI Performance Measures:

1. Paid and unpaid Work Experiences (WEX) with academic and occupational education as a component. WEX must account for at least 20% of WIOA Youth funds, such as:
  - Employment opportunities
  - Pre-apprenticeship programs
  - Internships and job shadowing
  - On-the-job training opportunities

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 in the management information system (EmployMT) will track most required data elements, but Subrecipients will be required to submit additional information in the form of progress, quarterly and financial reports every 3 months. 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 information contained in the reports for any of 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, 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 must conduct 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**

### III. APPLICANT SUBMISSION

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. Determine Local Area 1, 2, or both (separate applications required)
- b. 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. Table 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
- Table 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

## IV. 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 opportunity, including:
  - When the experience occurred
  - Location where it occurred
  - The customer for whom the services were provided
  - Experience working with youth no longer in the school system including school dropouts and youth with a high school diploma

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 options
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 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 Subrecipient 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 Subrecipient must participate in WSDs management information system EmployMT to provide a 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 high-quality and effective Youth Programs 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 planned 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. 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
  - b. 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 these assessments inform the service strategy for participants.
  - c. As a subrecipient, 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 Service Strategy Plan will be conducted and how it will be maintained to reflect the participants' goals around education and employment.
2. Explain your approach to identifying, engaging, and enrolling sufficient qualified participants.
  - a. Determine which population you intend to serve; In-School Youth (ISY), Out-of-School Youth (OSY), or both populations. Offerors must provide justification for why they chose not to serve a population and how youth not being served will get services to meet their educational and employment needs.
    - Montana received a waiver from USDOL reducing the OSY expenditure requirement to 50%. This allows more enrollments of and expenditures on in-school youth. As this funding opportunity is released, Montana is reapplying for the waiver. If not, the required amount will be 75% of funds allocated to youth services must be spent on OSY.
    - Define the proposed number of youth to be served in each of the two categories (ISY and OSY).
    - Describe how your agency will ensure that it will meet the requirement of expending no less than 50% of WIOA funding on out-of-school youth or explain your agency's plans to continue serving the majority of, or all OSY.
  - b. Describe your outreach strategies to reach, recruit and engage eligible youth throughout your proposed service area(s). How will you connect with youth? How will you connect with other youth-serving organizations?
  - c. Expand on any strategies or approaches planned for any special populations that will address their unique challenges.
  - d. How will you ensure eligible youth have access to your services without imposing additional barriers? Address transportation, technology, scheduling/office hours, and other barriers preventing program participation.

- e. Include how you know strategies are effective, using data as supporting evidence.
3. Describe your approach to the assessment process for participants in the program. Include the assessment tools used and their purpose. How will you identify barriers and support youth in addressing those barriers?
    - a. Make sure to detail specific assessment methods, and strategies for addressing individual needs and barriers to education, training, and employment. Include how you will offer incentives and stipends.
  4. Describe your approach to developing individual service strategies (ISS) based on the needs of each youth participant that leads to achievement of one or more acceptable youth performance outcomes: identifies career pathways that include education and employment goals; considers career planning and the results of the objective assessment; and prescribes services and achievement objectives for the participant.
  5. What types of training approaches and resources are you planning to utilize in your service approach? What is your Work-based Learning strategy?
  6. Outline your comprehensive plan for delivering WIOA Youth services. Detail the specific services offered, participant assessment methods and strategies for addressing individual needs and barriers.
    - a. Describe your approach to ensuring the 14 Youth Elements are available to participants. Include elements you plan to provide, and elements that would be provided by partners. Identify partners to support your efforts on ensuring the Youth Program elements are available to youth enrolled in the program. How will you work with workforce development partners to serve youth in an integrated system? How will you expand the partner network?
    - b. Describe the case management services you will provide for participants.
    - c. Do you plan to offer classroom training that requires an Individual Training Account (ITA)? Describe your agency's plans for establishing an ITA for ISY or OSY; and ensure that youth (ages 16-24) have access to the Eligible Training Provider List (ETPL).
    - d. Describe the procedures to determine the suitability and development of work-based training:
      - Paid and unpaid Work Experiences (WEX) with academic and occupational education as a component. WEX must account for at least 20% of WIOA Youth funds, such as:
        - Employment opportunities
        - Pre-apprenticeship programs
        - Internships and job shadowing
        - On-the-job training opportunities
      - How will you identify participants who are good candidates for work-based training?
      - How will you work with apprenticeship sponsors and employers?
      - How will you support participants through the early stages of work-based training to improve retention?

7. Describe 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 towards sustainable career pathways and educational programs that align with 406 JOBS: Modernizing Montana's Workforce Initiative and America's Talent Strategy and reflect the skill needs of industries that are important to the economies in the area(s) you serve?
  - c. Describe how you will engage with employers in the area served and connect program services with the needs of employers to ensure valuable skills, credentials, and experiences are obtained by youth. In addition, describe the types of employment resources you will provide for youth and why these resources are appropriate for this population.
  - d. Describe the procedures that will be used to determine suitability and development of work-based learning opportunities including the plan to ensure that at least the minimum requirement of 20% of WIOA funding will be spent on any one or more of the four categories of Work Experience: (1) summer employment, paid and unpaid work experiences available throughout the school year, (2) pre-apprenticeship programs, (3) internships and job shadowing, and On-the-Job Training (OJT) opportunities. Other work-based opportunities include registered apprenticeships.
  - e. Provide a step-by-step outline of participant flow (and retention), from enrollment to placement; include timeline expectations for resolving barriers.
8. Describe your approach to ensuring participants not only complete training but successfully transition into high-wage, in-demand careers.
  - a. How will your program provide ongoing employment support such as resume development, interview preparation, and barrier reduction while participants are engaged in skill development?
  - b. Additionally, outline how you will incorporate innovative practices and local resources to promote worker mobility and employer engagement, consistent with America's Talent Strategy and its five strategic pillars.
9. 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(s) that align with the 406 JOBS in-demand industries.
  - a. Describe what you see as workforce, economic, and educational training needs or challenges for the proposed service area.
  - b. What will be your approach to developing and sustaining apprenticeships and other work-based learning opportunities?
  - c. Detail how you will help employers understand incentives, risk mitigation strategies, and supports available when hiring these populations.

10. 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 all Youth Program elements and services.
  - 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.
  - c. How will your agency implement a fully integrated delivery system in the area served?
11. 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.
  - e. How will you verify that staff consistently deliver services in accordance with updated policies and program standards?
12. 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.
13. 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 accordingly?
  - c. Demonstrate how your proposed approach will meet federal performance measures 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?
14. Include any additional indicators of success not previously mentioned. This may include any 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

Resumes or summaries of qualifications, work experience, education, and skills must be provided for all key personnel, including any joint applicants, who will be performing any aspects of the award execution. Include years of experience providing services like 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 you plan to serve 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, WSD and 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, then report 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 the invoice, a summary line-item expenditure report and detailed line-item expenditure reports by fund source that support the invoice amounts should be submitted each month. WIOA funds are distributed through a process of drawdowns from the US DOL and 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 1<sup>st</sup> through the following June 30<sup>th</sup>. 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 end-of-year Financial Closeout documents. Subrecipients 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 must be entered into between the two parties. Copies of the sub-grant agreements must be submitted to the SWIB and WSD fiscal for approval prior to execution of any sub-grant agreements.

## Program Operating Plan (POP)

### 1. Planned Expenditures

Submit planned expenditures based on the funding proposed in the MACo district your agency

plans to serve. Use **Attachment - Program Operating Plan** to present estimated budget expenditures.

Montana received a waiver from DOL regarding the flexibility of the OSY expenditure requirement, by reducing it to 50%. This, in turn, allows more enrollments/expenditures on in-school youth. Montana is reapplying for the waiver for the upcoming program year. If unauthorized, the required amount will be 75% of funds allocated to youth services must be spent on OSY.

## 2. Work Experience Planned Expenditures

Submit work experience planned expenditures based on the funding received in the MACo district your agency plans to serve. Use **Attachment – Program Operating Plan** to present estimated budget expenditures.

A minimum of 20% of the funds allocated must be spent on paid and unpaid work experience. Including summer and yearlong employment opportunities, pre-apprenticeship programs, internships, and job shadowing. Allowable expenditures beyond participant wages can include staff time spent identifying potential work experience opportunities, staff time working with employers to develop the work experience, staff time spent working with employers to ensure a successful work experience, staff time spent evaluating the work experience, participant work experience orientation sessions, classroom training or the required academic education component directly related to the work experience, and orientation for employers.

## 3. Participant Data

Submit participant data on total participants to be enrolled, planned participants in training services, paid work experience, and exits in the MACo district your agency plans to serve. Use **Attachment – Program Operating Plan** to present participant data.

WSD expects subrecipients to serve a proportionate number of participants compared to their requested budget amount. This Youth Competitive Grant Award process requires at least one (1) youth enrollment for every \$7,500 requested in the Offeror's budget.

**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.

# V. 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

<b>Evaluated Competitive Grant Award Process Section</b>	<b>Point Values</b>
<b>Company Profile and Experience</b>	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
<b>Ability to Meet Scope of Service</b>	50% of points possible
1. Approach to managing eligibility and enrollment process	15 points
2. Approach to identifying, engaging, and enrolling participants	30 points

3. Approach to the assessment process	15 points
4. Approach to developing individual service strategies (ISS)	15 points
5. Types of training approaches and resources	15 points
6. Plan for delivering WIOA Youth services	30 points
7. Innovations and strategies to increase success	30 points
8. Approach to training/transition into high wage, in demand careers	25 points
9. Strategies that will ensure services are aligned with LMI	25 points
10. Strategy and plan for collaborating with partners	25 points
11. Adapt to shifting WSD or SWIB directives	15 points
12. Continuous improvement procedures	15 points
13. Demonstrate approach to meet federal performance measures	30 points
14. Additional indicators of success	15 points
<b>Staffing Plan/Resumes</b>	5% of points possible
Staffing plan and resumes	30 points
<b>References</b>	5% of points possible
2-8 References	30 points
<b>General Requirements</b>	<b>Pass/Fail</b>
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
<b>Cost Proposal</b>	20% of points possible
1. Program Operating Plan (POP) – Planned Expenditures	40 points
2. Program Operating Plan (POP) – Work Experience Planned Expenditures	40 points
3. Program Operating Plan (POP) – Participant Data	40 points
<b>Equal Pay for Montana Women <a href="#">EO 12-2016</a></b> 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

## VI. Referenced Attachments

Attachment – WIOA Glossary of Terms and Definitions

Attachment – WIOA.49 Form

Attachment – SWIB Sanction Policy

Attachment – 14 Youth Program Elements

Attachment – Program Operating Plan (POP)

Attachment – Federal Terms and Conditions

Attachment – General Requirements

## VII. Other Resources

[Workforce Innovation Opportunity Act](#)

[State Workforce Innovation Board](#)

[Montana DLI Workforce Services Division](#)