



A Private-Public Partnership Serving Branch, Calhoun, Kalamazoo, and St. Joseph Counties  
300 S. Westnedge Avenue, Kalamazoo, Michigan 49007-4630

**Michigan Works! Southwest  
Workforce Development Program  
Request for Proposal 2024-1**

WIOA Adult and Dislocated Worker Services  
For Branch, Calhoun, Kalamazoo, and St. Joseph Counties

*Funding for activities identified in this RFP are made possible by a  
Workforce Innovation and Opportunity Act (WIOA) grant through  
the Department of Labor and Economic Opportunity (LEO), State of Michigan*

**This RFP Notification Expires on  
April 12, 2024, at 4:00 p.m. EST**

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**Michigan Works! Southwest Workforce Development Program  
Request for Proposal (RFP) 2024-1**

- Section 1: INTRODUCTION** provides a brief summary of the context within which services requested are to be delivered within the Michigan Works! Southwest Area.
- Section 2: SCOPE OF RFP** provides a description of the manner in which services will be delivered in the Michigan Works! Southwest Area, eligibility criteria for service providers, funding levels, period of performance, area served, service delivery structure and expected deliverables.
- Section 3: SOLICITATION SCHEDULE** provides a timeline of key activities that will take place during the solicitation process.
- Section 4: PROPOSAL REVIEW AND EVALUATION** highlights the elements considered in the review and evaluation of the proposals. This includes a review of the proposal's compliance with RFP Instructions, management capabilities, programmatic capabilities, and performance expectations. In addition, Risk Assessment requirements, reviewing the performance, qualifications and procedures of bidding agency are outlined.
- Section 5: PROGRAM FEATURES AND DESIGN** describes the design of the workforce development network for the WIOA Adult and Dislocated Worker services.
- Section 6: SERVICE PROVIDER REQUIREMENTS** provides description of additional administrative requirements.
- Section 7: GENERAL ADMINISTRATIVE REQUIREMENTS** address the administrative roles and responsibilities of the Michigan Works! Agency, Subrecipient information, process for the notification of awards and a number of provisions required by federal and/or state law as part of the solicitation process. See Reference #2 for detailed information.
- Section 8: ASSURANCES, CERTIFICATIONS and STIPULATIONS** identifies assurances and certifications which are required by state and/or federal law as they pertain to the administration of activities authorized by the Workforce Innovation and Opportunity Act (WIOA) and other relevant statutes and regulations. See Reference #3 for detailed information.
- Section 9: NARRATIVE RESPONSE WORK STATEMENT** provides the instructions for the written narrative response.
- Section 10: STAFFING** provides instructions for completion of a profile of each staff assigned to the proposal.
- Section 11: PERFORMANCE OBJECTIVES AND SERVICE PLAN** provides the format for the identification of proposed performance outcomes.
- Section 12: BUDGET** data provides the instructions and format for completing the budget.

## REFERENCES

These RFP instructions have incorporated supplemental resources including data and information on local workforce development activity. The following are enclosed as references:

- Reference #1 Michigan Works! Southwest Network Structure
- Reference #2 General Administrative Requirements
- Reference #3 Assurances, Certifications, and Stipulations
- Reference #4 Michigan Works! Southwest Certification Documents
- Reference #5 Michigan Works! Southwest – Chart of Line Item Descriptions
- Reference #6 Michigan Works! Southwest Workforce Development Board Policy Summaries
- Reference #7 Request for Proposal (RFP) Appeals Procedure
- Reference #8 Michigan Works! Southwest 2024 Workforce Development Board and Michigan Works!  
Administrative Staff
- Reference #9 Demand Driven Approach
- Reference #10 WIOA Federal Performance Measures
- Reference #11 Resource List
- Reference #12 Michigan Works! Expenditure and Services Activity for PY2020, PY2021, PY2022

Persons preparing responses to the RFP may access appropriate Workforce Innovation and Opportunity Act guidance and regulations, along with Uniform Guidance, published reports, and materials as may be available to aid in the development of their proposals. A resource list is included as Reference #11.

## Section 1 – INTRODUCTION

Michigan Works! Southwest (MWSW) is releasing funding for the delivery of the Workforce Innovation and Opportunity Act (WIOA Adult and Dislocated Workers services and is placing high expectations that the entity selected will provide a level of professional services commensurate to the funding allotted. The selected bidder must have the ability to navigate federal and state policies and regulations, develop innovative strategies and perform at the highest possible levels.

The Michigan Works! Network is a demand driven workforce development system that serves businesses as the primary customer to ensure that employers have the skilled workers they need. It is based on the fundamental premise that in order for the state's employers to compete successfully in the international marketplace, they need better workers, better educated students from our school systems, and better trained individuals coming from our public and private training providers. Through the Michigan Works! Demand Driven System we will be able to better match employer needs with training provided to workers. A focus on businesses as a primary customer does not minimize our commitment to excellent customer service to our job seekers, instead it is through the utilization of this demand driven strategy that local businesses are engaged and Michigan Works! Agencies can effectively direct job seekers to appropriate training and stable job placements that lead to financial self-sufficiency.

The system includes Michigan Works! Service Centers in all counties across the state providing locally designed and operated services to meet local labor market needs.

- Employers seeking workers can post their job listings on the state-wide public labor exchange; Pure Michigan Talent Connect (PMTTC) available at <http://www.mitalent.org>.
- Job seekers can also post their resumes on PMTTC for review by employers who are recruiting workers.
- Dislocated workers can get help finding new jobs through labor market information and help with job seeking skills, such as resume writing assistance, and, as appropriate, in-demand skills training.
- Individuals receiving public assistance receive help in finding and maintaining employment.
- Young people can find information and assistance in making the transition from school to higher education or a long-term career.
- Individuals looking for training opportunities can utilize the state-wide Internet-based eligible training provider list; Michigan Training Connect (MiTC) available at <http://www.mitalent.org/mitc>.

The Michigan Department of Labor and Economic Opportunity is the State's lead agency in the implementation of the statewide Michigan Works! Network. Locally, the County of Kalamazoo (Board of Commissioners) has been designated as the Grant Recipient by the State of Michigan to provide for the planning, implementation, delivery, and overall management of workforce development services for Branch, Calhoun, Kalamazoo, and St. Joseph Counties.

In accordance with the Workforce Innovation and Opportunity Act, or any successor legislation, Kalamazoo County as the local grant recipient designated the W.E. Upjohn Trust Corporation (W.E. Upjohn Institute for Employment Research) to act as both Administrative and Fiscal agent for employment and training funds awarded to the service area and as governed by Public Act 8 of 1967 agreement between the Michigan Counties of Branch, Calhoun, Kalamazoo, and St. Joseph.

Michigan Works! Southwest, a department within the Center for Workforce Innovation and Solutions division of the W.E. Upjohn Institute for Employment Research, provides the administrative and fiscal management duties for this Michigan Works! Agency. Michigan Works! Southwest is one of two Michigan Works! agencies that make up the State of Michigan's Prosperity Region 8. Services from the state's major workforce development programs are to be accessible in a seamless manner and a core set of services are to be available, free of charge, to all that seek them. Special attention is given to meeting the needs of veterans and individuals with disabilities. Generally, this is achieved through One-Stop Service Centers located throughout the State in each Michigan Works! Area. The One-Stop Service Centers (also referred to in Michigan as "Michigan Works! Service Centers") encourage co-location, functional alignment, integrated services and a customer focus.

## Section 2 – SCOPE OF RFP

This section provides a description of the manner in which services will be delivered in the Michigan Works! Southwest area, eligibility criteria for subrecipients, funding levels, period of performance, area served, service delivery structure, and expected deliverables.

Specifications identified in this RFP are subject to change if funding is not available or if federal and/or state statute, regulation, and/or policies require programmatic adjustments at any time prior to the expiration of this RFP.

### A. SERVICE PROVIDER ELIGIBILITY

1. An award as a result of this RFP will be made to an organization legally organized to conduct business in the State of Michigan and who has demonstrated success in delivering the services proposed.
2. Organizations that provide, for a fee, vocational or occupational training must be licensed by the State of Michigan.
3. Preferential consideration may be given to organizations located in proximity to the Michigan Works! Southwest Area (Branch, Calhoun, Kalamazoo, and St. Joseph Counties); who are minority or female owned organizations/businesses; or, faith or community-based organizations, or educational institutions that are both cost effective and meet criteria for demonstrated effectiveness.

### B. FUNDING

Funding levels identified in this RFP are preliminary estimates to be used for planning purposes and represent 90% of the current year's subrecipient allocation, to provide the services outlined in this RFP. These levels do not include carry-over of unexpended funds from prior year.

1. Funding Source  
Workforce Innovation and Opportunity Act of 2014
2. Funding Levels

An *estimated level of funding* for these services, as outlined in this RFP, is:

<b><u>Program Year 2024</u></b>	
WIOA Adult Services	<b>\$1,311,309</b>
WIOA Dislocated Worker Services	<b>\$322,956</b>
<b>Total</b>	<b>\$1,634,265</b>

Funds allocated for Adult and Dislocated Workers services will cover all costs associated with proposed activities including funds to perform required subrecipient administrative functions. The funds do not include Infrastructure Funding Agreement costs. Note: The WIOA requires local boards, with the agreement of the Chief Elected Official, to develop and execute Memorandums of Understanding (MOUs) with One-Stop partners concerning the operation of the One-Stop delivery system in the local service delivery area. In accordance with the WIOA Final Regulations at 678.500, the MOUs must also include an IFA, which details how infrastructure costs for the One-Stop delivery system will be funded in the local area.

### C. PERIOD OF PERFORMANCE

1. Operational Period

The period of this RFP is for three program years. However, Michigan Works! Southwest reserves the right to initiate a solicitation earlier if changes in funding or legislation have an impact on program design elements as described in this RFP Instructions. Funds made available to Michigan Works! Southwest for this RFP are for the first year (PY2024).

PY2024: July 1, 2024 through June 30, 2025

PY2025: July 1, 2025 through June 30, 2026

PY2026: July 1, 2026 through June 30, 2027

2. Subaward Agreement Period

The initial subaward issued through this solicitation will be developed for a one-year period. The development of agreements for the second year of funding are contingent upon the availability of state/federal funding, attainment of satisfactory performance objectives and the negotiation of budgets and performance levels.

3. Program Transition

Should a subaward agreement be awarded to an organization that is not the current service provider of WIOA Adult and Dislocated Worker Services in the Michigan Works! Southwest area, the new service provider will be responsible for all services and participants associated with the services carried into the program year 2024 (beginning July 1, 2024) from program year 2023 (ending June 30, 2024). The service provider selected to provide WIOA Adult and Dislocated Worker Services is responsible for fulfilling the terms and commitments of any participant currently active on the statewide management information system, as of July 1, 2024. A plan will be developed to ensure that a smooth and efficient transition takes place. Separate transition agreements may be negotiated for a period prior to July 1, 2024, to enable these responsibilities to be carried out.

Equipment purchased (copiers, computers, faxes, etc.) with WIOA Adult and Dislocated Worker funding remains the property of the WIOA Adult and Dislocated Worker Programs. If a change in service provider should occur, the existing equipment shall be transferred over to the newly awarded service provider at the time of transition. If a newly assigned service provider finds it necessary to upgrade or replace certain equipment, they would need to budget for those expenses. An inventory list is available upon request.

**D. AREA SERVED**

1. A physical presence for WIOA Adult and Dislocated Worker services must be maintained at the Michigan Works! Southwest Service Centers (also referred to as One-Stop Service Centers) in Branch, Calhoun, Kalamazoo, and St. Joseph Counties. However, due to limited space availability at the Michigan Works! Service Centers, specific services may need to be provided from other locations such as schools, community-based organizations, neighborhood centers, etc.
2. The selected recipient is responsible for making arrangements concerning the locations at which the services outlined in this RFP are provided. Limited shared office, conference and classroom space will be available in the Branch, Calhoun, Kalamazoo, and St. Joseph County Michigan Works! One-Stop Service Centers to provide WIOA Adult and Dislocated Worker Services, as necessary.
3. A One-Stop Operator is designated for each One-Stop Service Center. The role of the One-Stop Operator is to coordinate a system of management, staff development, and use of common information systems among the partner agencies to support integrated service delivery and customer friendly service.
  - a. While a separate provider will manage the operations of the Michigan Works! Southwest One-Stop Service Centers, all partners physically housed at each Center have a shared responsibility to ensure that all customers receive services at the highest level possible. Partner agencies,

individually and collectively, establish the “culture” of the One-Stop Service Centers.

- b. To ensure that Michigan Works! Southwest One-Stop Service Centers maintain a culture that is highly respected by customers and peers, each partner is expected to assist in the maintenance of One-Stop Operations. Michigan Works! Southwest requires all One-Stop partners to execute a Memorandum of Understanding with respect to the roles and responsibilities of partners at the One-Stop Service Centers.

**E. SERVICE DELIVERY STRUCTURE**

1. Only one service provider will be selected for the award of services identified in this RFP. The successful bidder will provide services specified in this RFP in the Michigan Works! Southwest area, inclusive of Branch, Calhoun, Kalamazoo, and St. Joseph Counties.
2. In consideration of the importance assigned to this activity, it is imperative that service providers possess a keen understanding of the requirements of the services requested, the customer service groups, and service strategies required. Service providers must demonstrate their capacity to address the demands identified in these RFP Instructions.

**F. TYPE OF AGREEMENT**

Agreements resulting from this solicitation will be “cost-reimbursement.”

**G. DELIVERABLES**

Deliverables are those items that must be achieved within the timeframe of the subaward agreement period to enable full payment of expenses. Deliverables do not replace performance measures and all performance measures are not defined as deliverables. Payments will be based on the achievement of deliverables in a manner agreed by Michigan Works! Southwest and the service provider. These may include, but are not limited to:

1. Establishment of services at the Michigan Works! Southwest Service Center in each county.
2. Appropriate expenditure of funds made available in the subaward agreement, in alignment with state policy.
3. Cost per participant (not less than 90% of subaward agreement level).
4. Cost per entered employment (not less than 90% of subaward agreement level).
5. Achievement of the WIOA Performance Measure goals set in the subaward agreement for activity occurring during the period the service provider contracted services.
6. Not less than 80% accuracy on all data validation reviews.

**H. PAYMENT ADJUSTMENTS**

Michigan Works! Southwest reserves the right to withhold payment equal to five percent (5%) of reported expenditures through the subaward agreement period if the deliverables established in the subaward agreement are not achieved.



## Section 3 – SOLICITATION SCHEDULE

### A. SCHEDULE OF SOLICITATION ACTIVITIES

To the extent possible, the following schedule will be followed for the administration of this Request for Proposal:

RFP Instructions Released	Tuesday, March 7, 2024
Technical Assistance Deadline	Tuesday, March 12, 2024, by 4:00 p.m. EST
Technical Assistance Responses Available	Thursday, March 14, 2024, by 4:00 p.m. EST
Notice of Intent to Bid Due	Friday, March 15, 2024, by 4:00 p.m. EST
Proposals Due	Friday, April 12, 2024, by 4:00 p.m. EST
Award Announcements	Approximately Friday, April 26, 2024

In addition, based on the discretion of the Michigan Works! Southwest Workforce Development Board RFP Review Committee, an interview process of bidders may be implemented and individual interviews with each bidding organization may be scheduled.

This schedule will be adhered to as closely as possible. However, Michigan Works! Southwest reserves the right to make revisions without prior notification.

### B. SUBMISSION DETAILS AND DEADLINE

1. Proposals must be submitted by 4:00 p.m. EST on Friday, April 12, 2024.

Proposals must include signature in an electronic copy via e-mail to MIWorks @upjohn.org. Please note: RFP 2024-1 in the subject line.

1. It is the responsibility of the interested bidder to ensure that the proposal is received by Michigan Works! Southwest by the date and time specified above.
2. Proposals must be complete, legible, and technically accurate at the time of submission. Each proposal will be reviewed as submitted. After a proposal is submitted, it may not be modified prior to review, unless requested by Michigan Works! Southwest.
3. A proposal may be withdrawn from consideration for funding if such a request to do so is transmitted to Amanda Rosenberg at MIWorks@upjohn.org. Please note: RFP 2024-1 in the subject line.

### C. LATE PROPOSALS

Proposals received by Michigan Works! Southwest after 4:00 p.m. EST on the date specified may not be considered for award under this solicitation.

### D. TECHNICAL ASSISTANCE

Organizations are responsible for the content and development of their own proposal. Individuals preparing responses to the RFP may access appropriate Workforce Innovation and Opportunity Act guidance, regulations, Federal Management and Budget Circulars, published reports, and materials as may be available to aid in the development of their proposals. A resource list is also included as Reference #11.

1. Technical Assistance Timeline

Technical assistance will be provided through 4:00 p.m. EST, Tuesday, March 12, 2024. The Technical Assistance Contact identified below will receive questions. Only written questions submitted via email will be accepted. Responses that may have an impact on the interpretation or clarification of these RFP

Instructions will be posted on the Michigan Works! Southwest website.

2. Technical Assistance Contact

For purposes of administering this solicitation, the individual responsible for responding to any question that may arise during the preparation of proposals in response to this RFP is:

Amanda Rosenberg at [MIWorks@upjohn.org](mailto:MIWorks@upjohn.org). Please note: RFP 2024-1 in the subject line.

**E. PROPOSAL CONTENT AND ORGANIZATION**

All proposals shall be prepared to assure consistency and uniformity in terms of appearance and content. All proposals must be submitted in accordance with the following specifications.

- Proposals must be single-spaced in 11 point font with 1” margins all around.
- Pages for the narrative response (Form D) should be numbered consecutively.
- Charts and/or graphs may be used if they convey required information. These should be provided as attachments.
- Supplementary documentation as required by these RFP instructions is to be included as attachments to the proposal. However, do not provide additional information if it does not directly support the proposal narrative.
- All proposals submitted shall contain the following documents and be compiled in the following order:
  1. Cover Sheet and Proposal Certification (Form A) (Do not provide a separate cover letter)
  2. All Risk Assessment materials
  3. Performance Objectives (Form B)
  4. WIOA Adult Budget Documents (Form C1)
    - 1A - Wage and Benefit Detail – WIOA Adult Basic Career Services
    - 1B – Wage and Benefit Detail – WIOA Adult Individualized Career Services
    - 1C – Wage and Benefit Detail – WIOA Adult Training
    - 1D – Wage and Benefit Detail – WIOA Adult Follow-up
    - 2 – Budget Detail Worksheet
    - 3 – Budget Summary
    - 4 – Expenditure, Enrollment, and Termination Schedule
  5. WIOA Dislocated Worker Budget Documents (Form C2)
    - 1A – Wage and Benefit Detail – WIOA Dislocated Worker Basic Career Services
    - 1B - Wage and Benefit Detail – WIOA Dislocated Worker Individualized Career Services
    - 1C – Wage and Benefit Detail – WIOA Dislocated Worker Training
    - 1D – Wage and Benefit Detail – WIOA Dislocated Worker Follow-up
    - 2 – Budget Detail Worksheet
    - 3 – Budget Summary
    - 4 – Expenditure, Enrollment, and Termination Schedule
  6. Budget Narrative (Form C3)
  7. Narrative Response for Statement of Work (Form D)
  8. Conflict of Interest Statement (Form E)
  9. Staffing Description, Resumes, Organizational Chart
  10. Proposed Programming Flowchart

## Section 4 – PROPOSAL REVIEW AND EVALUATION

All bidding organizations must submit documentation required of the Risk Assessment as part of the submitted proposal.

### A. COMPLIANCE REVIEW

#### 1. RISK ASSESSMENT

Risk Assessments will be reviewed by Michigan Works! Southwest and will examine the performance of each bidding organization based on a review of qualifications, past performance and procedures. Criteria to be evaluated include:

The bidding organization's prior experience with the same or similar subawards;

- I. The results of previous audits, including whether or not the subrecipient receives a Single Audit in accordance with Subpart F - Audit Requirements of the OMB Uniform Guidance, and the extent to which the same or similar subaward has been audited as a major program;
- II. Whether the bidding organization has new personnel or new or substantially changed systems; and
- III. The extent and results of Federal awarding agency monitoring (e.g., if the subrecipient also receives Federal awards directly from a Federal awarding agency).

To exhibit these criteria, Risk Assessment materials to be submitted should include:

- a. Procurement process and procedures of the bidding organization. If not applicable, a signed statement agreeing to accept the procurement and property management policy of Michigan Works! Southwest. Information regarding Michigan Works! Southwest Local Workforce Development Board Policies is included as Reference #6.
- b. Internal controls and management procedures of the bidding organization.
- c. Cost Allocation Plan/Methodology.
- d. Audit and Management Letters.

All bidders must provide a copy of the most recent audit of the agency, or in the absence of an audit, a statement from a CPA that the agency/organization's accounting system and internal control procedures are adequate for the purpose of accounting for and reporting of Federal revenues and expenditures in compliance with generally accepted accounting principles and Federal requirements.

- i. Monitoring performance reports, as applicable, performed by an outside agency/third party.
- ii. All bidding agencies must provide copies of monitoring reports, performance reports, program (non-financial) audits and similar reports, that attest to your agency's operational capabilities. The documents must be relevant (i.e., address program operations that are the same as or substantially equivalent to those proposed) and current (i.e., not older than two years).

If none of these documents are available, the bidding agency must provide a description of how program activities and operations are reviewed for quality and customer satisfaction.

iii. Proof of Legal Status

All bidding agencies must have active registration on the System for Award Management website, <https://www.sam.gov>. Please note that there is no cost to register on this site.

All agencies that are not current subrecipients of Michigan Works! Southwest must include documentation that shows Board resolution specifying who within your organization is assigned the authority to execute subaward agreements and revisions to subaward agreements.

Certification Documents Requiring Signature/Affirmation

The following documents must be incorporated into any agreement developed resulting from this solicitation.

- They must be executed by the organization through signature and affirmation. (See Reference #3, "Assurances, Certifications & Stipulations")
- Certification Regarding Lobbying for Contracts, Grants, Loans, and Cooperative Agreements (See reference #4)
- Certification Regarding Debarment, Suspension, Ineligibility, Voluntary Exclusion Lower Tier Covered Transactions (See reference #4)

Per this evaluation, the identification of a bidder deemed to be high risk does not eliminate a proposal from consideration. It simply requires additional steps to be taken to address any real or apparent risk.

Per 2CFR Part 200.207, high risk is defined as: when an applicant or recipient has a history of failure to comply with the general or specific terms and conditions of a Federal award; when an applicant or recipient fails to meet expected performance goals as described in 2CFR Part 200.210; information contained in a Federal award; or when an applicant or recipient is not otherwise responsible.

**B. TECHNICAL REVIEW**

Proposals will be reviewed by Michigan Works! Southwest to determine:

- Timeliness of submission of all required documents,
- Adherence to all the RFP Instructions,
- All required documents and responses are complete, and
- Any requested references and supplemental documentation are provided and are complete.

Upon completion of Technical/Compliance Review by Michigan Works! Southwest, and having determined that the bidding agency met the minimum standards in regard to compliance, the Michigan Works! Southwest Agency Administrative staff and Michigan Works! Southwest Workforce Development Board RFP Committee will move forward with a complete merit review in the following areas: Management Capabilities, Programmatic Capabilities, Program Outcomes, Budget Plan and Overall Assessment.

**C. EVALUATION AND SCORING**

**MANAGEMENT CAPABILITIES (35%)**

The RFP evaluation will examine the management performance of each agency based on a review of the organization's qualifications and experiences described in response to these RFP Instructions and any of the documentation provided with the proposal.

Previous experience with the bidding organization and the Risk Assessment evaluation will also be taken into consideration when scoring this section.

**PROGRAMMATIC CAPABILITIES (35%)**

Program design demonstrates an understanding of required services, administrative responsibilities, resource coordination and integration, community partnering, customer service, data collection responsibilities, staffing and management plan, etc.

**PROGRAM OUTCOMES (10%)**

Performance objectives (Outcome expectations, expenditure and service level plan, etc.).

**BUDGET ASSESSMENT (15%)**

Budget documents demonstrate completeness and internal consistency. The descriptions of elements of expense are adequate enough to determine allowability of expenses and reasonableness for the activities proposed.

**OVERALL ASSESSMENT (5%)**

Assessment of the overall proposal will take into consideration the proposal's Executive Summary and the quality of responses in the aggregate relative to completeness, consistency, reasonableness for the services proposed, cost and performance outcomes.

**D. REVIEW AND APPEAL PROCESS**

Bidders wishing to appeal the final funding decision resulting from this solicitation must submit their written request to the RFP Technical Assistance Contact at Michigan Works! Southwest Agency (Upjohn Institute), 300 S. Westnedge Avenue, Kalamazoo MI 49007-4630, within ten (10) calendar days following the date of the written notification of the funding recommendation.

The request for appeal shall include a clear description of the grievance and basis for appeal. The request shall be signed by the bidder's authorized signatory.

The request will be processed through the established appeal process for the Michigan Works! Southwest Area (Reference #7, Request for Proposal (RFP) Appeals Procedure).

## Section 5 – PROGRAM FEATURES AND DESIGN

### Overview

The bidder shall design and offer year-round services that reflect the principle of the legislation: to strengthen and improve our nation's public workforce system and help get Americans, including youth and those with significant barriers to employment, into high-quality jobs and careers and help employers hire and retain skilled workers

The purposes of WIOA described in the statute include:

- Increasing access to and opportunities for the employment, education, training, and supportive services that individuals need, particularly those with barriers to employment.
- Supporting the alignment of workforce investment, education, and economic development networks, in support of a comprehensive, accessible, and high-quality workforce development network.
- Improving the quality and labor market relevance of workforce investment, education, and economic development efforts.
- Promoting improvement in the structure and delivery of services.
- Increasing the prosperity of workers and employers.
- Providing workforce development activities that increase employment, retention, and earnings of participants and that increase postsecondary credential attainment and as a result, improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet skill requirements of employers, and enhance productivity.

### Eligibility

WIOA Adult and Dislocated Worker Eligibility can be found in the [State of Michigan WIOA Manual](#).

### Case Management

Case Management includes the development of an Individual Employment Plan (IEP), also referred to as an Individual Service Strategy (ISS), based on comprehensive assessments for every participant receiving career and/or training services. The IEP should identify employment goals, appropriate achievement objectives, and the appropriate combination of services for the participant to achieve employment goals. The assessments should determine the person's job readiness, specific employment and training needs, specific strengths and deficiencies, the person's financial, social and/or supportive service needs, and should justify the services to be provided. Additionally, the assessment is an on-going activity that continues throughout a participant's relationship with the service provider and may include:

- Career services received,
- Other fund sources investigated,
- Other fund sources being accessed or combined with the WIOA Title I-B,
- A comprehensive assessment that includes current skills and educational level and previously completed education and training,
- Individual's ability to complete the course of training,
- Cost and duration of the training,
- Wage and wage progression expectations, and

- Employment opportunities that result in long-term job retention in the local labor market or a geographic area to which the client is willing to relocate.

Comprehensive assessment tests include one of the following:

1. Test for Adult Basic Education 11/12 (TABE 11/12)
2. Comprehensive Adult Student Assessment System (CASAS) Reading GOALS
3. CASAS Math GOALS

The State of Michigan previously aligned all allowable Title I assessment options with those approved by the U.S. Department of Education for Title II. The State will now accept additional testing sources for the purpose of verifying low literacy levels for prioritization of adults and dislocated workers. However, assessments that are not National Reporting System (NRS) approved may not be recorded for Educational Functioning Level (EFL) gains under the Measurable Skills Gain (MSG) performance metric.

Individuals eligible for training services select a program after consultation with a career planner. Career planners should encourage individuals to fully-utilize the information available on the Eligible Training Provider List (MiTC), provide additional information beyond the MiTC and other reports, assist individuals with doing their own research on programs or providers, and help individuals identify specific options and systematically compare them. Career planners should monitor the individual's progress through the various levels of program services.

### **Individual Employment Plan (IEP)/Individual Service Strategy (ISS)**

An Individual Employment Plan (IEP)/Individual Service Strategy (ISS) (which may be used interchangeably) must be completed and entered into the statewide database for each participant, consistent with the requirements of the state's Management Information System. The IEP/ISS will specify obligations of both the participant and the successful bidder.

The WIOA rules explain that the IEP/ISS is an individualized, meaningful service, jointly developed by the participant and career planner. The IEP/ISS includes an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to obtain these goals and objectives. IEPs/ISSs are one of the most effective ways to serve individuals with barriers to employment, and to coordinate the various services, including training services, they may need to overcome these barriers.

The IEP/ISS is the basis for the overall case management strategy. The career planner should utilize the IEP/ISS to update strategies and activities as they occur, and to document referral and contact information for services obtained from partner organizations. When reviewing the IEP/ISS, career planners should document a participant's progress, activities completed, benchmarks reached, and any other accomplishments.

Additionally, the IEP/ISS should be:

- Developed in partnership with the participant.
- Used as a meaningful tool that can and will change over time, as necessary, to meet the needs of the individual.
- Used as a roadmap to achieve measurable and attainable short-term and long-term goals.
- Designed to reflect the individual's interests and incorporate career planning.

The provision of services should be a result of, and consistent with, the customer's assessment and IEP/ISS. Having a well-developed IEP/ISS and related documentation is required and is a fundamental part of case management. Once an IEP/ISS is developed and approved, it should be used in the on-going process of monitoring and re-evaluating the participant's progress toward educational and occupational goals.

The IEP/ISS should be a “living document” and reviewed and updated as life changes occur, including the participant’s interests and ambitions, as strategies are updated, as services are obtained from partner organizations, as activities are completed, and as goals are met and benchmarks are reached. The participant must receive a copy of the plan signed and dated by both the participant and career planner. When the plan is significantly modified, such as the addition or modification of information that may be used as data validation source documentation, a new copy of the IEP/ISS should be signed and dated by both parties and provided to the participant.

### **One-Stop Services for Adults and Dislocated Workers**

Adults and Dislocated Workers must have access to the Michigan Works! Service Centers (MWSC) and may use the services provided by the Centers. Services, at a minimum, should include uploading resumes on Pure Michigan Talent Connect (<http://www.mitalent.org/>), searching for jobs that are available, access to information in the Resource Room, and access to other career-related information. When appropriate, Adults and Dislocated Workers should also be included in Job Fairs conducted at the Service Centers or coordinated by Michigan Works! Southwest and held at alternate in-person and virtual locations.

The ongoing use of the Service Centers shall be an integral part of a participant’s career development and job search activities.

The Adult and Dislocated Worker Service provider must maintain a presence at the Michigan Works! One-Stop Service Centers.

### **Services**

The WIOA provides for:

1. Basic career services.
2. Individualized career services/case management.
3. Training services.
4. Follow-up services.

#### Basic Career Services

Basic career services are universally accessible and must be made available to all individuals seeking employment and training services. Basic Career Services include: WIOA eligibility determinations, outreach/intake (worker profiling), provision of information on programs and services, initial skill assessments, labor exchange services, program referrals, labor market information, performance/program cost information, information relating to the availability of supportive services (including referrals for Child care, Child support, Medicaid, SNAP, HUD), and information regarding filing claims for unemployment compensation. Provision of information must be in usable and understandable formats and languages. These services may be provided by both the Adult and Dislocated Worker programs.

#### Individualized Career Services

Individualized career services must be based on the employment needs of the individual as determined jointly by the individual and the career coach (case manager) and may be identified through an individual employment plan. Generally, these services involve significant staff time and customization to each individual’s need. Individualized career services include services such as: specialized assessments, developing an individual employment plan, group and/or individual counseling, career planning, short-term pre-vocational services, internships, transitional jobs, workforce preparation, and financial literacy.

#### Training Services

Training services are provided to equip individuals to enter the workforce and retain employment. The WIOA clarifies that there is no sequence of service requirements in order to receive training. Training is made available to individuals after an interview, assessment, or evaluation determines that the individual requires training to obtain employment or remain employed.



Training services may be made available to employed and unemployed adults and dislocated workers who:

- It is determined, after an interview, evaluation or assessment, and career planning are:
  - Unlikely or unable to retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
  - In need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone; and
  - Have the skills and qualifications to participate in training services.
- The training must be directly linked to the employment opportunities either in the local area or planning region, or in another area to which the individual is willing to commute or relocate.
- The participant is unable to obtain grant assistance from other sources to pay for the training, including other grants such as state-funded training grants, TAA, and Federal Pell grants, or requires assistance beyond that available from other sources to pay for the cost of training.
- Is a member of a worker group covered under a petition filed for TAA and is awaiting a determination. If the petition is certified, the worker may then transition to TAA approved training. If the petition is denied, the worker will continue training under the WIOA.
- Is determined eligible in accordance with the state and local priority of service in effect for adults under the WIOA Section 134(c)(3)(E) if training services are provided through the adult funding stream.

Types of training services that may be provided include:

- Registered Apprenticeships.
- Occupational skills training, including training for nontraditional employment.
- On-the-job training.
- Incumbent worker training.
- Programs that combine workplace training with related instruction, which may include cooperative education programs.
- Training programs operated by the private sector.
- Skill upgrading and retraining.
- Entrepreneurial training that assists individuals who are seriously interested in starting a business in Michigan and becoming self-employed.
- Job readiness training provided in combination with any of the aforementioned training services, with the exception of registered apprenticeships.
- Adult education and literacy activities, including activities of English language acquisition, and integrated education and training programs provided concurrently or in combination with any of the aforementioned training services, with the exception of registered apprenticeships and transitional jobs training.
- Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

In most circumstances, an individual will receive training services through an Individual Training Account (ITA). The selection of a training program should be fully informed by the performance of relevant training providers and individuals must be provided with performance information for all training providers who provide a relevant program.

While funding for Individual Training Account (ITA) Vouchers is included in the allocation identified in these RFP Instructions, ITA funds allocated in the proposal budget will not be incorporated in the final contract for

Career and Training Services. Funds allocated by the subrecipient for ITAs are paid directly to the training institutions by the Michigan Works! Southwest Agency. This provision does not apply to funds allocated by the subrecipient for employer reimbursement for on-the-job training. The On-the-Job Training (OJT) funds will be incorporated into the Career and Training Services contract and managed by the subrecipient.

#### Follow-up

Follow-up services must be provided, as appropriate, for adults and dislocated worker participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment.

#### **Participant Files**

Each participant shall have a case file with detailed information on supportive service needs, assessment results, eligibility documentation, and case notes documenting active case management and follow-up, including how service decisions are made, and other information that will help create a strategy for success. Thorough case file maintenance and documentation by case notes are essential to the effective provision of case management, as they assist with managing and supporting participants' progress.

The subrecipient will ensure that each participant file contains documentation sufficient to evaluate the participants activities and progress through the program as well as verify all U.S. DOL program data validation elements. Per the WIOA Manual, certain information is required by federal regulations and state policy for all the WIOA program participants. The following information is required and must be maintained in a hard copy or printable electronic format in the permanent case file for each WIOA Adult, Dislocated Worker, National Emergency Grant, NDWG participant:

- A signed and dated copy of the WIOA Registration Form. This form may not be filled out in pencil.
- Copies of documentation of eligibility and criteria used for verification of eligibility, unless the information can be retrieved electronically.
- Written notice of exit for an ineligible participant (if appropriate).
- "Equal Opportunity is the Law" statement signed by the participant or a signed acknowledgement that the participant received a copy of the statement.
- A signed and dated copy of an acknowledgement that the participant has reviewed or received a copy of the MWA's grievance and complaint procedure.
- A signed and dated copy of the MWA's release of information form.
- A minor work permit, if a minor participates in a work experience activity.
- A signed and dated copy of notification about how registration information will be used to evaluate effectiveness of programs through data sharing between other State of Michigan data systems is required.
- ISS/IEP or Educational Development Plan.
- Objective assessment results, including the name of the assessment instrument(s) utilized.

If legislation changes during the course of the contract for these services that require additional documentation, that documentation will automatically be added to the required documentation list. In addition, medical and disability information should be maintained as directed in the WIOA Manual and in local WDB Policy.

#### **Business Solutions Team (BST)**

All service providers in the Michigan Works! Southwest Area will be expected to partner with the Michigan Works! Southwest Business Solutions Team (BST) and partake in BST activities.

The BST concept is a key strategy that can move workforce development programs towards a more demand driven network and provide greater value to customers, the job seeker and business. The BST concept has three features:

- A focus on Business as the driver and primary customer;
- A team of workforce development professionals committed to relationship development with businesses; and
- Strategic collaboration with regional economic development and education partners to provide business solutions to businesses.

The BST concept requires the workforce development network to place businesses as the primary customer. A strong relationship with businesses through which business solutions are provided, leverages an increasing number of jobs for people served, thereby serving the needs of both employers and job seekers. Listed below are objectives of successful workforce development network interactions with businesses:

- Assess where jobs are, and will be, in the near and long-term future;
- Assess skills required to fill jobs available today and in the future;
- Provide individualized business solutions in partnership with other local, state, and federal workforce development, economic development and education partners; and
- Provide industry sector-based business solutions in partnership with other local, state, and federal workforce development, economic development and education partners.

A focus on businesses as the primary customer does not limit or decrease the attention to excellent customer service to job seekers. On the contrary, a focused strategy to engage with businesses around the objectives above enables staff to better direct job seekers to appropriate training and stable job placements that lead to financial self-sufficiency. The BST concept propels the network towards creating and sustaining the jobs that serve customers and, in the process, take a stronger leadership role in the region's overall quality of life (See Reference #9, Demand Driven Approach)

### **Priority of Service for Veterans and Eligible Spouses**

The MWA makes a concerted effort to ensure veterans and eligible spouses receive priority of service at point of entry and throughout all stages of education, employment, and training services. Local policies and procedures are in place to ensure the integration of priority of service for veterans and eligible spouses into services.

### **Additional Requirements for Dislocated Workers**

The selected subrecipient will serve on the Rapid Response team (i.e., mass layoffs or closings) assisting with efforts in the Michigan Works! Southwest Area as they occur. Individuals registered under the Trade Act must be dual enrolled with the WIOA Dislocated Worker services.

## Section 6 – SERVICE PROVIDER REQUIREMENTS

The bidding organization shall, as part of the Risk Assessment Review described in Section 4, A. #1. submit their “Internal Controls and Management Procedures” necessary to ensure that the tasks and functions listed below are discharged in a timely and accurate manner and which maintain the highest level of integrity.

### A. MONITORING AND OVERSIGHT

The bidding agency shall have in place a “System of Internal Monitoring” which will be conducted to ensure compliance and progress in managing program and administrative goals.

The use of an electronic format for reporting participant information does not remove the responsibility of the service provider to maintain tangible documentation adequate to support participant receipt of program information, request and receipt of supportive services, and attendance and participation in assigned activities.

#### 1. Internal Monitoring Mechanisms and Responsibilities

Internal monitoring will include at a minimum:

- Compliance with Federal, State and local policies and regulations
- Required program reports and assessments
- Monthly financial reports, invoices and budget changes
- Participant status change notices, ISS updates and competency documentation
- Participant follow-up and tracking
- Participant attendance, responsibilities, and evaluation of progress
- Outreach and recruitment
- Performance outcomes
- Quarterly Report Analysis (QRA) outcomes
- Participant job readiness and competency attainment
- Monitoring work site safety and compliance with established work training agreement
- Proper case noting on the state management information system.
- Accuracy and timeliness of time sensitive activities
- Monitoring of file content
- Monitoring of data elements for data validation
- Complete procurement and record management

#### 2. External Monitoring Responsibilities

Michigan Works! Southwest retains the overall authority for monitoring the performance of activities within this subaward. Michigan Works! Southwest staff will monitor program and fiscal activity. Monitoring activities will be conducted through on-site evaluations and the desktop review of program reports. The Workforce Development Board may have the opportunity to attend and provide feedback on activities conducted under this agreement.

Michigan Works! Southwest will provide written notice of formal monitoring visits, including those performed by the state or other external entities. However, unannounced observations and visits may be conducted periodically for assessment and general information purposes.

#### 3. Reports/Monitoring Tools

Submission of the following reports/information are required and the information shall be submitted in Microsoft Word or Excel format in accordance with the deadlines provided. The following reports will be utilized for the review/assessment of activities. In all cases of performance relating to participant

activity, only that data generated through the state Management Information System shall be considered as "official."

- **Annual Accessibility of Program Activities Report-** Initial submission by the subrecipient of an assessment of their accessibility of program activities as well as the physical accessibility of their location (s). The forms and format of this report will be provided by the MWA.
- **Quarterly Reports -** Service provider narrative description of performance during the preceding quarter using a focused list of questions provided by Michigan Works! Southwest.
- **Invoiced and Uninvoiced Cost Reports -** Provided by the subrecipient to report accrued and actual expenses for a specified period.
- **Special Reports/Requests -** Occasionally requested to provide specific information regarding activities conducted under the contract. Time frames for submittal shall be included with request.

#### **B. CUSTOMER SATISFACTION/ SERVICE ACCOUNTABILITY**

Service providers will establish a customer satisfaction review system that encourages follow-up with customers and to allow for information and data to be collected to track customer services and outcomes (the customer satisfaction review system is to be defined in this proposal response. See Form D.).

At a minimum, the following components are expected:

1. The system must utilize data generated through the state developed system of measuring customer satisfaction to implement service improvements;
2. The system must institute an integrated service management process;
3. Partners must adhere to confidentiality protections for customers, as required by state and federal law and regulations; and
4. Development of interagency agreements for information exchange (where necessary).

#### **C. STATE MANAGEMENT INFORMATION SYSTEM**

The State Management Information System participant tracking and reporting system is used for all programs operated through the Michigan Works! Network. Data entry requirements for both initial information and any subsequent changes or updates are critical. Inaccurate data or a delay in the entry of data can result in a severe impact on the MWA's outcomes that are driven by specific calendar dates.

The awarded subrecipient will enter and maintain information in the state management information system and shall ensure timely and accurate collection and reporting of participant data (within 2 business days).

It is therefore critical that service providers ensure that the state management information system functions are adequately staffed with personnel that have a good working knowledge of the state management information system functions, requirements, and the WIOA Electronic Participant Management Information Guide (E-PMIG) along with the WIOA Manual and that this function is a priority for those staff assigned to the state management information system.

The awarded subrecipient will enter and maintain information in the state management information system and shall ensure timely and accurate collection and reporting of participant data, including, but not limited to:

- Completion of Enrollment, Status Change and Exit
- Completion of training documentation

- Maintenance of participant information
- Complete and regular updates of the IEP/ISS
- Completion of case notes that document case manager/participant interaction, activity progress, issues that may be impacting participant progress, supportive services, follow-up services, and any other items that document decisions or issues impacting the participant
- Completion of performance outcome updates including those related to Measurable Skills Gain (MSG), post-exit employment information and credentials.

**D. GRIEVANCE PROCEDURES**

The awarded subrecipient will establish and implement a written procedure to handle client complaints and grievances. The procedures will ensure that clients have the opportunity to present any complaints or grievances and clearly outline the process that must be followed for both an initial grievance as well as opportunities for appeal. A copy of these procedures MUST be provided to Michigan Works! Southwest upon award. (See Reference #6, WDB Policy Summary)

**E. CONFLICT OF INTEREST**

To ensure that the subrecipient, the Michigan Works! Southwest Administrative Staff, and the Michigan Works! Southwest Workforce Development Board have full protection from apparent or real conflict of interest; the proposal must include a completed and signed Form E “Conflict of Interest Statement.”

The identification of an apparent or real conflict of interest with the Michigan Works! Southwest Workforce Development Board or Michigan Works! Agency staff on this form does not eliminate a proposal from consideration. It simply requires additional steps to be taken to address any real or apparent conflict of interest.

**F. EQUAL OPPORTUNITY PROCEDURES**

Equal Opportunity

The awarded subrecipient (organization) is required to have procedures in place for ensuring compliance with federal and state Equal Opportunity, Affirmative Action, and Non-Discrimination requirements, including the manner in which they are applied to the hiring, retention, and promotion of staff. Bidders must describe how these practices will be applied to program customers in their proposal response. (See Form D).

Program Accessibility

The awarded subrecipient may be required to complete a “Self-Evaluation: Program Accessibility” (See Section 6, A. #3).

**G. STAFF DEVELOPMENT**

The service provider will ensure that staff assigned to specific functions are both qualified and trained to perform the task(s). They shall ensure that current and new staff are:

- Informed of the overall Michigan Works! Network and One-Stop Center services;
- Informed and kept current of policy and compliance requirements of the WIOA Adult and Dislocated Worker programs;
- Informed and continuously updated on the technical requirements for the specific task(s) to which they are assigned; and
- Provided the opportunity to participate in MWA trainings and/or activities that will enhance their skills in performing their job and overall knowledge of the workforce development network.

**H. RECORD RETENTION**

Program records must be retained for a minimum period of three years following the date on which the expenditure report containing the final expenditures charged to any program year's allotment is submitted to the US Department of Labor, Employment and Training Administration by the State of Michigan. This date is extended until existing audit/litigation problems are resolved. (Reference #6, WDB Policy Summary)

## **Section 7 – GENERAL ADMINISTRATIVE REQUIREMENTS**

**GENERAL ADMINISTRATIVE REQUIREMENTS** address the administrative roles and responsibilities of the Michigan Works! Southwest Agency, and process for the notification of awards and a number of provisions required by federal and/or state law as part of the solicitation process. (See Reference, #2 “General Administrative Requirements” for detailed information.)

**Section 8 - ASSURANCES, CERTIFICATIONS, AND STIPULATIONS**

**ASSURANCES, CERTIFICATIONS and STIPULATIONS** identifies assurances and certifications which are required by state and/or federal law as they pertain to the administration of activities authorized by the Workforce Innovation & Opportunity Act and other relevant statutes and regulations. (See Reference #3, "Assurances, Certifications, and Stipulations" for detailed information and Reference #4 for Michigan Works! Southwest Certification Documents.)



<b>Section 9 – NARRATIVE RESPONSE WORK STATEMENT</b>
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Expectations for the Michigan Works! Southwest Network and implementation of WIOA Adult and Dislocated Worker Services in the local area have been identified in these RFP instructions. The narrative response must take into consideration not only what your organization would be directly responsible for, should your proposal be accepted, but also the level of reliance on other components of the local Michigan Works! network and the community.

**USE FORM “D” FOR YOUR NARRATIVE RESPONSE**

<b>Section 10 – STAFFING</b>
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**A. DESCRIPTION OF STAFFING**

For staff assigned to provide services, in whole or in part, provide the following information that describes the level of staffing. These staff will also be listed on the “Staff Wage and Benefit Detail.”

1. Position Title & Staff Name (Assigned by the organization)
2. Position Classification (Professional, paraprofessional, technical, managerial, clerical)
3. Full-time Equivalency (Express fractions as decimals, i.e., ½ time as .50 FTE)
4. Areas of Responsibility (Identify primary functions that will be assigned to this position)
5. Qualifications (Identify skills, attributes and/or prior experiences for the individual filling this position)
6. Credentials (Identify credentials that are required for this position and a brief explanation of how these credentials relate to this position)

**B. RESUME**

Provide an **updated resume** for all staff assigned to these projects.

**C. ORGANIZATIONAL STRUCTURE**

Provide a chart that depicts the organizational relationship of the positions identified above. Include the line of supervision, staff names, and FTEs for each position.

**Section 11 - PERFORMANCE**

Complete Form B, "Performance Objectives" by inserting your proposed performance goals.

## Section 12 – BUDGET

### A. BUDGET INFORMATION AND FORMS

The forms contained in this RFP have been produced in an electronic spreadsheet format (Microsoft Excel). The individual forms are presented as separate “worksheets” and are electronically linked to each other. Therefore, they are intended to be completed in the order presented. Instructions pertaining to data entry in specific cells are included on each form. **Please review the “Instructions” tab prior to completing any of the Budget Forms.**

1. **Staff Wage and Benefit Detail (Form C-1):** The Staff Wage and Benefit Detail provides a breakdown of the wage and fringe benefit cost for each position funded for the proposed services. The detail from this form provides the detail necessary to complete the Budget Detail Worksheet.
2. **Budget Detail Worksheet (Form C-2):** This form provides a detailed presentation of each of the line items appropriate for the activity proposed. Total expenses noted for each line item are transferred to the appropriate cost category/line item on the Budget Summary. Wage and benefit information is extracted from the Staff Wage and Benefit Detail.
3. **Budget Summary (Form C-3):** This form provides the summary of line item cost, by cost category. Information presented on this form is extracted from the Budget Worksheet.
4. **Expenditure, Enrollment, and Termination Schedule (Form C-4):** This form will document the anticipated monthly participant and expenditure activity throughout the subaward agreement period. Projections of the monthly activity will reflect what would reasonably be expected based on the program design. An equal monthly distribution of participant activity and/or expenditures is not reasonable and will not be seen as an acceptable response.

### B. BUDGET INFORMATION

1. **Period of Budget** - The budget should reflect expenses for the period of performance stated in the proposal. The duration of this funding cycle extends from July 1, 2024 and ending June 30, 2025.
2. **Budget Presentation** - A line item budget is required for all proposals.
3. **Budget Narrative (Form C-5)** - The narrative will provide a description of the elements of each line item on the “Budget Detail Worksheet.” Please follow specific directions when completing the narrative descriptions. Examples of responses are provided.

### C. COST CATEGORIES

For the purpose of this RFP, expenditures identified must comply with the limitations on certain costs as defined by regulation. All costs identified in the proposals submitted for consideration must be identified.

### D. ALLOWABLE COSTS

Only costs directly related to the operation of the Workforce Innovation and Opportunity Act (WIOA) program, allowable per 2 CFR 200 and properly supported with back-up data and records will be allowable charges to the program. For shared time or shared facilities arrangements, where staff charges, facilities, utilities, supplies, etc. are to be funded by more than one source, a cost allocation plan must be included with each proposal (See subsection E below).

#### Indirect Costs

Each item of cost incurred for the same purpose shall be treated consistently in like circumstances either as a direct or indirect cost in order to avoid possible double-charging of Federal awards. Guidelines for determining direct and indirect costs charged to Federal awards are provided in OMB 2 CFR Part 200

Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards;  
Subpart E – Cost Principles §200.413 and §200.414.

If the bidding agency is requesting for indirect costs to be considered, a complete justification of indirect charges is to be submitted as an attachment to Form D, at the time of submission.

**E. LINE ITEM DESCRIPTIONS**

A “Chart of Line Item Descriptions” provides a description of the types of cost that are most likely to be included in the respective line item of the budget documents. Because these definitions may differ from the descriptions that may be used by other organizations, please consult Reference #5, “Michigan Works! Southwest – Chart of Line Item Descriptions” when assigning costs to your budget line items.