**REQUEST FOR PROPOSAL**

**WIOA Service Provider**

**Napa, Marin, Lake, & Mendocino Counties**

**PYs 2025 through 2028**

* WORKFORCE INNOVATION AND OPPORTUNITY ACT,
* CareerPoint North Bay - Service Provider (Americas Job Center of California, AJCC),
* JOB SEEKER SERVICES

(Adults, Dislocated Workers, and Youth), and

* TRAINING AND WORK EXPERIENCE OPPORTUNITY LIASON

(Adults, Dislocated Workers, and Youth)

*A Proud Partner of America’s Job Center of California Network*

**Bruce Wilson, Executive Director**

**Workforce Alliance of the North Bay (WANB)**

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**SECTION 1 : INTRODUCTION**

The Workforce Alliance of the North Bay (WANB) is issuing this Request for Proposals (RFP) seeking offers from experienced responders interested in providing Workforce Innovation and Opportunity Act (WIOA) services to Adults, Dislocated Workers and Youth within its four (4) county area. WANB serves the counties of Napa, Marin, Mendocino, and Lake Counties. Contract(s) awarded from this RFP will be funded by the Workforce Innovation and Opportunity Act (WIOA), Title I, Public Law 113-128.

The successful bidder(s) will be selected based on:

1. Demonstrated abilities,
2. Historic performances of employment and training program delivery including robust participant outreach and successful outcome attainments,
3. Innovations in service delivery strategies that boost the number and quality of serves provided to the WIOA target populations,
4. Organization’s track record using strategic decision making in American Job Centers, and collaborating with the One-Stop Operator’s work achieving functional collaboration and integration with workforce partners at the AJC,
5. Cost-effective service delivery strategies that produce high-quality outcomes, and high customer satisfaction, and
6. Historical ability to work within the local, state, and federal structures of WIOA, including fulfilling its responsibilities to administer, track, use, and report events and expenditures as required by the WANB, EDD, and DOL.

*Examples are using the CalJOBS system, tracking and making strategic changes in operation to meet training expenditure requirements, meeting youth work experience requirements, meeting spending and fund obligation requirements, and adhering to marketing and promotion guidelines*.

WANB is seeking bidders to provide the services to the following program populations, referred to as “Programs” throughout this RFP:

1. WIOA Adult Services
2. WIOA Dislocated Worker Services
3. WIOA Youth Services

Proposals may be submitted that offer services to a single county or two, three, or all four counties.

Additionally, proposals may be submitted that offer service to one, two, or all three program populations (Adult, Dislocated Worker, and Youth).

Proposals must be clear about which county or counties your agency is offering to serve, what services you are offering, and what program populations (Adult, Dislocated Worker, and Youth) that are included in the proposal.

*WANB encourages proposals that offer the full array of services to WANB’s targeted populations within a county or group of counties, to ensure that all workforce development needs are covered.*

*If a proposal limits the types of services and/or the program populations to be served, and WANB does not receive complementary proposals to cover serve gaps, and WANB is unable to stitch multiple proposals to cover the comprehensive needs of all three program populations withing all four-county area(s), WANB may not consider those limited proposals.*

Again, WANB’s intent is to make sure that all four counties will be fully served.

The base funding that will be used for the Service Provider function is WANB’s WIOA allocation provided by the State of California, EDD. That funding will be allotted to each county in proportion to the state’s disaggregation formula. Additional funding may be added to each counties budget depending on opportunities for grants and other awards.

Non WIOA Formula funding is not incorporated into this RFP. Proposers however should keep in mind that if they are awarded a contract by this RFP, the budget may not be limited to only the base WIOA Formula allocation. WANB may realize savings from prior year and/or receive additional funding during a contract period, and those funds may be used to augment the Service Provider’s annual budget.

As discussed in SECTION 1.5 below (ELIGIBLE AGENCIES), consortiums, joint ventures, or collaborations of organizations can apply, but proposals must clearly identify one legal entity as the prime respondent that will be designated as a sub-recipient to WANB and will hold contracting responsibilities and liabilities.

WANB’s Workforce Development Board has developed a set of four guiding principles detailed below in “SECTION 2.9 WANB’S VISION OF THE AJCC NETWORK.”

The overriding consideration in developing these guiding principles is to achieve:

* + - the highest quality of services that can be delivered,
    - the most cost-effective delivery of those services, and
    - that services will be provided to the greatest number of residents.

This RFP is structured, so proposers can provide narratives to explain their plans and how their plans are responsive to the Board’s guiding principles.

The RFP requests descriptive offerings of innovative delivery systems that are not limited by established practices or outcomes. Respondents have the discretion to describe how they would use WIOA funds in allowable ways to strategically meet the guiding principles, specific to the county(s) included in their RFP. Proposals will be judged on the merit of their strategies relative to other competing proposals, as well as the proposer’s demonstrated ability to implement those strategies.

The RFP will also consider the proposer’s commitment to leverage non-WIOA resources. WANB wants workforce services delivered that is responsive to the regions dynamic needs and that will be effective.

The RFP will evaluate how proposers can create dexterity in their strategic planning process, so that when conditions and needs change, responses and funding (within each county and each target population) can be smoothly and quickly transitioned into providing needed services efficiently and effectively.

The following list of goals and objectives respond to the WANB Workforce Development Board’s four guiding principles:

1. **More Clients**
   1. Better and easier access.
   2. Dispersed access to remote areas with solid plans to be responsive and practical.
   3. Increased AJCC reputation (A consequence of good service and customer valued outcomes).
   4. Streamlined and comprehensive services (Functional partnerships and meaningful, outcome-based actions).
   5. Priority Industry Sector focus.
   6. Higher “Active” Caseloads (Customers remaining engaged with a “positive velocity” towards success).
      1. Decreased duration of time that it takes customers to achieve success.
      2. Fewer unsuccessful customers that linger in job search and job acquisition.
2. **Quick Enrollments**
   1. Intake, enrollment, and initial assessments are done in short order.
   2. Assistance is provided to customers regarding obtaining documents.
   3. Decreased need for multiple appointments to complete the process.
3. **Reducing Service Time** – Lowering the average number of months of service a customer needs to reach success, eliminating service delays and inessential services.
4. **Services that directly address the participant’s Individual Employment Plan** The IEP will be used as a true blueprint that prepares participants for the jobs they need.
   1. Strong systems that do an excellent job of matching job seekers skills, capabilities, and the WANB labor market needs,
   2. Right-sizing services that add value to the customers goals and objectives, and
   3. Providing realistic outcome reports for trainings. (EPTL, OJT, Apprenticeship…)
5. **More Employment outcomes**
   1. Higher employment wages and benefits.
   2. Quicker employments (Including quicker training related placements.).
   3. High number of participants that stick with the program until they find a job they are being trained for.
   4. Reducing the number of participants that are accepting employment in jobs that are unrelated to the training provided.
   5. More jobs gained because of “Training Related” skills gains.
   6. Limited cases where an expensive training is provided for an in demand and/or expanding sector, where the participant becomes employed in a low paying job that did not require the new skills the program just paid for.
   7. Longer job retentions.
   8. More upward mobility potentials (promotions and portability).
   9. High number of repeat employers looking to hire WANB participants.
6. **Better Services**
   1. Strong assessment and realistic customer evaluations to assist them in the gaining positive outcomes.
   2. Industry standard caseloads for staff.
   3. Effective cross training so staff can help meet the wholistic needs of the customers.
   4. Tapping into the proficiency and resources of partners and creating functional working relationships with them. This point requires coloration with the One-Stop-Operator.
7. **High Job Seeker Customer Satisfaction**
   1. Customer’s perceptions of quick and timely services.
   2. Customer’s perceptions of strong individual values received.
   3. Customer’s success measured by the job and the earnings/benefits.
      1. Acquisition of jobs in careers with sustainable futures.
   4. Value added follow-up services (not just logging of contacts).
8. **Higher Employer Satisfaction**
   1. Greater Employer satisfaction that the skill levels of AJCC referrals are strong and relevant to the job.
   2. Mor employers returning to AJCC because they see it as a resource for finding qualified workers.
   3. Greater number of workplace trainings transitioning into full time positions.
9. **Efficient cost of doing business**
   1. Flexible use of staff resources (multi-skilled staff that can be mobile, performing the functions that are needed.)
   2. Facility footprints and staffing assignments that are right sized for traffic flow.
      1. Flexible expansions and reductions of operations when practical and feasible within the budget.
   3. Greater leveraging of resources from partners.

## SECTION 1.2 CONTRACT TERMS

This RFP is for contract(s) for services over a three (3) year period, from July 1, 2025, through June 30, 2028. WANB expects the contracts will be in force for the three-year period.

Depending on the contractor(s) performance and the continued availability of WIOA funding, the contracts awarded by this RFP may be renewable for an additional three years.

## SECTION 1.3 SCHEDULE OF EVENTS AND PROPOSAL SUBMITTAL

|  |  |
| --- | --- |
| RFP Release Date | August 30, 2024 |
| Bidder’s Conference | September 19, 2024 |
| Proposal Deadline | September 30, 2024 |
| Bidder’s Interviews | TBD |
| Formal Review of Proposals | October 7 - 11, 2024 |
| WANB Regional WDB | December 12, 2024 |
| WANB Governing Board Approval | December 20, 2024 |
| Contract Start Date | July 1, 2025 |

**SECTION 1.4 PROPOSAL SUBMITTALS**

This RFP will require submittal by no later than Monday, September 30, 2024.

*The submittal must be postmarked with a date stamp of September 30, 2024 or before. The mailing address to submit the proposals is PO Box 247, Napa CA 94559.*

The submittal must contain one original “wet” signature, signed by an authorized person of the prime respondent agency together with an electronic copy (preferably on a thumb drive).

All electronic proposals must be in PDF format, limited to 40 pages, and typed in12 point font.

Proposals may include attachments that clarify the proposal and or show examples of previous work, but the attachments may not be read in their entirety by the review team, at their discretion. Respondents should make sure the essence of their offer is in the limited 40 pages. Attachments are not counted in the page limit for proposals.

The RFP includes schedules for **Participant Plans** for the various Programs (Adult, Dislocated Worker and Youth) individually completed for each county, and **Budgets** also individually completed for each county. Participant Plan(s) and Budget(s) schedules are not counted in the page limit for proposals.

Proposals in file formats other than PDF will only be accepted if the respondent obtains prior written approval from WANB Executive Director.

Faxed proposals will not be accepted.

The RFP Contact Person and email address for this RFP is:

***Stefan Ochoa***

*RFP@workforcealliancenorthbay.org*

*Note: All questions must be made in writing to the above email address.*

## SECTION 1.5 ELIGIBLE AGENCIES

Agencies that may apply include:

1. Community-Based organizations,
2. Post-Secondary Educational institutions,
3. Public agencies,
4. Private Non-Profit agencies/institutions, and
5. Private For-Profit agencies/institutions.

Consortiums, joint ventures, or collaborations of organizations, that have complementary skills and experience are encouraged to apply, but proposals must clearly identify one legal entity as the prime respondent that will hold contracting responsibilities and liabilities. Proposals must clearly distinguish which partners represented in a proposal are subrecipients and subcontractors and disclose the type of financial agreements and/or non-financial collaborations have created the partnership.

Any respondent with whom the WANB Workforce Development Board (WDB) executes a contract (awardee) for the provision of the services described in this Request for Proposals will be a sub-recipient of WANB.

The awardee must comply with the Workforce Innovation and Opportunity Act and all other applicable federal and state laws, regulations, and WANB policies that shall apply. And, because WANB is funded by EDD, all requirements issued by directives from EDD are required in the performance, oversight, and reporting for this award.

## 1.6 BIDDER’S CONFERENCE

WANB will hold a Bidder’s Conference to present the RFP requirements and answer questions.

Questions may be emailed to WANB leading up to the Bidder’s Conference. The time between the release of the RFP and the Bidders Conference is considered an “open period” that WANB will accept and post written responses to questions about the RFP.

Questions may be emailed to RFP@workforcealliancenorthbay.org

Responses will be posted on the WANB website located at: <https://www.workforcealliancenorthbay.org/rfps/> as practical.

*(Emails received too close to the Bidders Conference may be addressed at the Bidders Conference, and included on the website disclosing all information provided at the Bidders Conference).*

The Bidder’s Conference will be held using a zoom meeting on Thursday, September 19, 2024, at 2:00 p.m. The Bidder’s Conference will be recorded and posted to WANB’s website located at: https://[www.workforcealliancenorthbay.org/rfps/](http://www.workforcealliancenorthbay.org/rfps/) Participation in the Bidders Conference is optional.

Other than the record of this Bidder’s Conference, and emailed questions and answers posted leading up to the Bidder’s Conference, no direct communication with WANB staff regarding this RFP is allowed.

Respondents are asked to refrain from directly contacting WANB Workforce Development Board members or WANB staff with questions regarding the RFP. Violation of this requirement may result in disqualification from the bidding process.

WANB reserves the right to consolidate or group RFP questions to streamline the response process.

WANB will provide the call-in number and additional information to all registrants.

## SECTION 1.7 ESTIMATED WIOA FUNDING

Funding for the WANB Service Provider contracts will include the Base Allocation received from the State, carried in funds unspent from the prior year’s allocation, and additional funding for special projects that might be awarded to WANB in addition to the Formula Funding.

The Base Allocation for each program year is determined by the US Department of Labor based on a formula contained in the regulations. That formula distributes the WIOA State Formula Funds to states and territories. California’s portion of the statewide award is received from the DOL and EDD uses the same formula to distribute statewide fund to local area for Adult and Youth programs and a similar formula for the Dislocated Workers program. For WANB, the State then disaggregates WANB’s awards into portions attributed to each of its four counties.

For planning purposes, respondents to this RFP should understand that the level of funding for the program year 2025 (July 1, 2025, to June 30, 2026) is currently not certain.

As noted above, the WANB awards for each of its four counties includes any unexpended funds from the previous year’s total. The recognition of what that amount will be is also not known at this time, and won’t be until the close-out of that year’s program. Accordingly, the amount of funds carried in from PY 24 will not be known until after the start of PY 25.

Also as noted above, WANB may receive funding to provide services for special projects, from public and non-public sources. Special grant funding may be added at any time during the period of performance and the WANB Service Provider will be the presumptive deliverer of services for these special project awards.

Therefore, contractors will be expected to work collaboratively with WANB and modify budgets and the scope of work to effectively use all funding, as incorporated by bilateral modifications of the Service Provider contract.

For the purpose of budgeting your proposed Service Provider program activities, **please use the PY 2024 allocations shown below.** This is a conservative amount for budgeting, but it will be a consistent budget amount that will allow for the comparable review of all Requests for Proposals.

Please keep in mind, that the evaluation of the budget during the award process shows the way your organization plans to use funding to operate the Service Provider contract. As noted above, the budget is expected to be larger than the Base Allocations, but those base allocations are a fair planning amount for respondents to describe their intent and the extent they envision providing services.

Please feel free to enhance the budget submittals with any narrative that you believe will be valuable that shows how the emphasis of spending will change when additional funding is added. Narratives for the budget are limited to 2 pages, using 12 point font.

Special grants may be specific to a geographic area, population or other defining factor. Although the Service Providers who are awarded contracts by this RFP are the presumptive deliverer of special project programs, WANB and the Service Provider will collaborate in developing program design and cost structure of those additional funding.

The following table details the estimated funding available by county and program:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **County** | **Adult** | **Dislocated Worker** | **Youth** | **TOTAL** |
| **Lake** | $245,258 | $159,539 | $230,802 | $635,599 |
| **Marin** | $237,648 | $298,582 | $229,198 | $765,428 |
| **Mendocino** | $209,665 | $157,067 | $228,380 | $595,112 |
| **Napa** | $152,250 | $216,307 | $184,335 | $552,892 |

\**These amounts may increase or decrease by July 1, 2025 based on availability of formula fund allocation from the California Employment Development Department (EDD) and other special grant program funds. WANB anticipates that full funding allocations (administrative and programmatic funding) will be known on or about the time of the negotiations of contracts in Spring 2025.*

*\*\*Any separately negotiated profit will be funded by the above amounts, decreasing the amount of funding for operations.*

# SECTION 2: BACKGROUND

## 

## SECTION 2.1 OVERVIEW OF WIOA

WIOA was signed into law by President Barack Obama on July 22, 2014, and took effect on July 1, 2015. WIOA is the legislation that provides funding, guidance, and alignment of public workforce development systems across the United States. The intent of WIOA is to equip workers with the skills necessary to meet business needs and to provide businesses with access to the talent pool needed to compete in their local, regional, and global economy.

The creation of the One-Stop Career Center Network began in 1992 and is considered the cornerstone of the public workforce system. This network is now branded nationally as the American Job Centers (AJC), and in California as the America’s Job Center of California℠ (AJCC) network. These centers are also described as One-Stop centers. Under WIOA, the AJCC network is measured by their effectiveness, accessibility, and continuous improvement as it relates to their ability to achieve performance levels, to integrate services amongst mandatory partners of the system, and to meet the workforce development needs of the region.

The WIOA law outlines six (6) key purposes:

1. Increasing access to and opportunities for the employment, education, training and support services that individuals need to succeed in the labor market, with particular emphasis on those with barriers to employment.
2. Aligning workforce investment, education, and economic development systems to support a comprehensive, accessible, and high-quality workforce development system.
3. Improving the quality and labor market relevance of workforce investment, education, and economic development efforts to provide individuals with the skills and credentials needed to secure and advance in employment with family-sustaining wages and to provide employers with the skilled workers needed for success in a global economy.
4. Promoting improvements in the structure and delivery of services through the workforce development system to better address the employment and skill needs of workers, jobseekers, and employers.
5. Increasing the prosperity of workers and employers and the economic growth of communities and regions.
6. Increasing the employment, retention, and earnings of participants and increasing the attainment of recognized postsecondary credentials by participants to improve the quality of the workforce, reduce welfare dependency, increase economic self- sufficiency, and meet the skill requirements of employers to enhance productivity and competitiveness.

The U.S. Department of Labor envisions WIOA as the driver of workforce systems that support strong regional economies to play an active role in community and workforce development. America’s Job Centers of California (AJCC) are expected to provide excellent customer service with a focus on continuous improvement, and responsiveness to the needs of businesses and workers that drive workforce solutions.

More information on WIOA is available at the following websites:

* + California Employment Development Department: <https://www.edd.ca.gov/>
  + California Workforce Association: <https://calworkforce.org/>
  + California Workforce Development Board: <https://cwdb.ca.gov/>
  + Department of Labor’s [Training and Employment Guidance Letter (TEGL) No.](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=6455) [04-15](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=6455) [(Vision for the One Stop Delivery System under the WIOA)](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=6455):
  + [WIOA](http://www.doleta.gov/WIOA/) General Information
  + [WANB local Policies](https://www.workforcealliancenorthbay.org/policy-documents/)

## 

## SECTION 2.2 OVERVIEW OF THE WANB WORKFORCE DEVELOPMENT BOARD

The Workforce Alliance of the North Bay (WANB) is headquartered in Napa, California. It administers the Workforce Investment and Opportunity Act programs in Napa, Marin, Mendocino, and Lake Counties. WANB was established in 2016 and is led by a **Governing Board** (GB) comprised of two Board of Supervisors from each county served, and a **Workforce Development Board** (WDB) that oversee a broad range of programs and initiatives. The WDB includes representatives from small, medium and large businesses, labor organizations, education, economic development, community-based organizations and one-stop partners.

WANB currently has an established Service Provider contract with a single for-profit agency covering the region’s four county area which assures that job seekers and businesses have access to a comprehensive array of job training and employment services. Additional information about WANB can be obtained at [https://www.workforcealliancenorthbay.org](https://www.workforcealliancenorthbay.org/)

WIOA requires each local area (for this RFP, WANB) to have at least one comprehensive America’s Job Center of California (AJCC) WANB has elected to have a comprehensive site in each of the four counties.

Comprehensive AJCC’s provide access to the full range of workforce services from all mandatory partners operating in the geographical area, and includes all WIOA employment services, training and education, employer assistance and activities of all the mandatory AJCC partners.

The law provides that local boards such as WANB’s WDB act as the “shaper” of how One-Stop services are delivered within their Local Area. The current Memorandum of Understandings for the four counties can be found at <https://www.workforcealliancenorthbay.org/policy-documents/> under the MOU heading.

WANB functions as the WIOA grant recipient and fiscal agent. And as an administrative entity, it does not provide services directly to job seekers or directly develop service strategies that meet the needs of job seekers or employers. These functions are contracted out to Service Providers through a competitive Request for Proposal.

All expenditures incurred by contracted Service Providers in discharging their duties under the contract are categorized as Program Expenditures (and will not be included as administrative costs, which is allowed in WIOA).

WANB retains a portion of the region’s funding to perform Rapid Response functions including business outreach and engagement, and to finance the grant recipient administrative and fiscal agent duties.

## SECTION 2.3 ROLES AND RESPONSIBLITIES OF THE WANB REGIONAL WDB

The Workforce Development Board is appointed by the WANB Governing Board, acting in its capacity as the Chief Local Elected Official. The WDB is responsible for guiding and overseeing the workforce development system(s) relative to the WANB 4-county region with a goal of serving the needs of jobseekers and employers.

WANB works with the WDB and has the responsibility to manage and oversee the administration and implementation of WIOA programs and services. WANB also works with the WDB with respect to planning, oversight, and evaluation of the local One-Stop Career Center (AJCC) system.

Contracts for service with WANB’s WIOA Service Providers is authorized by the GB and the WDB. WANB staff will be responsible for the administration of the contract(s) and will provide information and analysis of operations to the GB and WDB.

Service Providers will be required to operate with full transparency, including resources consumed and resulting outcomes. Accordingly, WANB will work with the Service Providers, and on occasion jointly present the status of operations to the GB and/or WDB.

WANB’s roles and responsibilities include, but are not limited to the following:

* + Convene the One-Stop delivery system, lead efforts to keep current the Memorandum of Understanding with the WIOA System partners and facilitate system integration activities.
  + Oversee and evaluate the management and operations of all programs funded by WANB.
  + Allocate and award funds.
  + Monitor sub-recipient performance, quality of service, cost effectiveness, and report on performance to the GB and WDB.
  + Develop and provide policies and technical assistance to sub-recipients (Service Providers).
  + Inform sub-recipients of Federal and State policies, procedures, and rules that may impact the operations of the program(s) and give assistance as needed to implement them accordingly.
  + Monitor the local participant tracking system (CalJOBS).
  + Ensure compliance with all rules, regulations, and procedures issued by all funding sources.
  + Facilitate the regional and local planning processes.
  + Provide up to date labor market information.

## SECTION 2.4 CURRENT WANB COMPREHENSIVE AJCC SYSTEM

As described in Section 1.1, WANB’s WDB is looking for innovation in the delivery of workforce services that lead to the goals stated in section 2.9 (WANB’s Vision of the AJCC Network).

There are currently four comprehensive AJCC Centers throughout the WANB region (one AJCC in each of the four counties), with a variety of involved partners, operational methods, and traffic flow.

Comprehensive AJCC have a physical location where job seekers and employers “have access” to the programs, services, and activities of all required AJCC partners in at least one of the following methods:

1. co-location,
2. real-time referrals and
3. via technology (i.e. an online tool, phone call, video call etc.).

At comprehensive centers, all job seekers come through the same door and have access to a comprehensive menu of services. Outreach may be provided for target groups, such as dislocated workers from business closures or other special populations.

The comprehensive AJCC’s in the four-county region operate under a Memorandum of Understanding (MOU) between all the required AJCC partners. Although the current MOUs are in place and have minimal infrastructure cost sharing agreements (IFA), the integration and cost sharing is subject to the willingness of the partners, and the recommendations and agreements of the One-Stop Operator. The degree of partnering is driven by perceived benefits, and WANB expects the chosen Service Provider to fully cooperate and create value to the partners and the One-Stop Operator in ways that can increase sharing and the leveraging of resources.

WANB has a [Priority of Service policy](https://www.workforcealliancenorthbay.org/wp-content/uploads/2021/04/24.-WANB_Priority_of_Services_Policy.pdf) in place that gives priority to adults on public assistance and veterans. And, WANB prioritizes training and employment efforts corresponding to the regional [industry sectors](https://www.workforcealliancenorthbay.org/sector-strategies/) delineated in the [local plan](https://www.workforcealliancenorthbay.org/policy-documents/).

## 

## SECTION 2.5 AJCC CERTIFICATION PROCESS

The Workforce Innovation and Opportunity Act (WIOA) establishes a framework under which local Workforce Development Boards are responsible for maintaining a network of high quality and effective AJCCs. Local WDB’s are required to “certify” their AJCCs once every three years. The WIOA regulations outlines three key requirements for AJCC certification:

1. Effectiveness of the AJCC.
2. Physical and programmatic accessibility for individuals with disabilities; and
3. Continuous improvement.

The California Workforce Development Board develops criteria and procedures for local WDB’s to certifying AJCC’s and set a statewide standard of service delivery that ensures all customers consistently receive high-quality services.

Responders are expected to commit to participate in the certification and continuous improvements process.

## SECTION 2.6 AFFILIATE AND SPECIALIZED LOCATIONS

Affiliate locations are service centers, where not all required partners are present at the locations, but where any partner staff can facilitate the connectivity to required partner services on an as-needed basis.

Respondents may propose Affiliate and/or Specialized locations as access points but must include acknowledgement that they are willing to continue to participate in existing comprehensive AJCC as WANB determines is necessary. As noted above, WANB intends to maintain at least one Comprehensive AJCC in each of its county’s.

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## SECTION 2.7 MANDATORY PARTNERS AND PROGRAM INTEGRATION

WIOA requires that a Memorandum of Understanding (MOU) be developed and executed between the local WDB (WANB) and mandatory AJCC partners to establish a cooperative working relationship between the parties and to define their respective roles and responsibilities in achieving the workforce development objectives. The basis of the MOU is to create a local workforce system that is skill-based and moves AJCC customers through a set of value-added services designed to increase their employability, chances of retaining jobs, and opportunities to advance in their careers.

While AJCC network partners can provide services at the comprehensive brick and mortar locations, partners may also be connected through other methods of access such as technology and referrals. The AJCC Service Provider(s) are encouraged to cultivate and nurture partnerships, and those enhanced relationships may be articulated in revisions to the MOUs. For more information on Memorandum of Understanding expectation, respondents should refer to [EDD Directive Number:](https://edd.ca.gov/siteassets/files/jobs_and_training/pubs/wsd18-12.pdf) WSD18-12 “WIOA Memorandums of Understanding.”

The following table represents the federally required WIOA partners/programs and the regional organizations that represent each program:

Under WIOA, required One-Stop Delivery System Partners include (Section 121 (b)(1):

* WIOA Title I programs
* Wagner-Peyser programs
* Adult Education and Literacy programs
* Rehabilitation Act programs
* Welfare-to-Work
* Older Americans Act programs
* Perkins postsecondary vocational education activities
* Trade Adjustment Assistance and NAFTA-TAA programs
* Veterans Employment and Training
* Community Service Block Grant employment and training activities
* HUD employment and training activities
* Unemployment compensation programs
* Second Chance Act Programs
* Temporary Assistance for Needy Families (TANF)

Additional Partners – with approval of local board and chief elected official:

* Employment and training programs administered by the SSA
* SNAP and SNAP E&T programs
* Client assistance programs
* National and Community Service state grants
* Other appropriate federal, state or local employment, education and training programs

The current WANB MOUs can be found here: <https://www.workforcealliancenorthbay.org/policy-documents/>

## SECTION 2.8 CAREER CENTER VISITS AND ACTIVE WIOA ENROLLED CUSTOMERS BY AJCC CENTER FOR 2023-2024.

Information on recent career center visits, WIOA enrollments, expenditure rates and program funding can be found at: <https://www.workforcealliancenorthbay.org/workforce-dashboard/>

WANB expects all Service Providers, in conjunction with AJCC partners at the AJCC’s to use the “VOS Greeter” system to record every visit and visit reason. This includes on site hiring events and job fairs. AJCC Staff must ensure each individual obtaining services is registered in CalJOBS.

## WANB is seeking a Service Provider that can increase outreach and WIOA participant intakes, and who will increase greater value added resulting in attaining higher numbers of participants exiting with quality jobs.

## SECTION 2.9 WANB’S VISION OF THE AJCC NETWORK

The management of the AJCC network is the shared responsibility of the State EDD, the California Workforce Development Board, the local WDB, the AJCC Service Provider, One-Stop Operator, and the mandatory partners. WANB’s vision is outlined in its [Strategic Plan, Regional Plan, and Local](https://www.workforcealliancenorthbay.org/policy-documents/) [Plan and subsequent addendum](https://www.workforcealliancenorthbay.org/policy-documents/).

This vision can change as guidance from the DOL and EDD changes, or when economic and regional conditions change. Respondents are encouraged to:

1. Review all the documents listed above to align their program design with the vision of system delivery; and
2. Consider how their program design will remain responsive to future changes in the system whether driven by new guidance or collaboration opportunities.

WANB is seeking Service Providers who employ vision, innovation, accountability, efficient and effective utilization of resources in their workforce development program. And Service Providers with the interest of establishing a seamless services delivery system for all prospective AJCC customers.

As mentioned earlier in this RFP, WANB’s WDB has adopted the four Guiding Principles listed below. Respondents should read and understand these principles and address the ideals in their proposals.

# Guiding Principle #1 – Greater access to the workforce system

WANB is seeking creative proposals to provide greater and more convenient access to the workforce system for a larger number of participants. Bidders who propose creative solutions to increase access from current levels will receive additional points in the RFP scoring.

Examples of creative solutions might include, but are not limited to:

1. Multiple smaller access points versus fewer large comprehensive employment centers.
2. Place based services that get WIOA funded staff to deliver services where target populations exist or are comfortable receiving services.
3. Computer labs or kiosks strategically positioned in libraries or other community locations where basic career services can be accessed.
4. Creative partnerships within the local community to share the cost of space, staffing and other resources.
5. Increasing basic career services that are jointly provided by partner-paid staff
6. Individual career services and training provided through face-to-face appointments with WIOA staff in remote areas.
7. Electronic access to services from remote locations.

# Guiding Principle #2 – Greater number of clients enrolled

WANB AJCCs generally have moderate to high levels of client traffic with a relatively small percentages of those visitors becoming enrolled in the WIOA program. Respondents should utilize the RFP to explain their intentions to increase the numbers of clients enrolled and served by the WIOA program by using metrics that focus on the number of enrollments and a measurement of the average cost of those leaving the program with a positive outcome.

Examples might include, but are not limited to:

1. Increase the number of positive exits in the service area.
2. Enrollments of more job seekers who come into the centers who access basic and individual career services.
3. Improved methods to attract more job seekers for enrollment into WIOA increasing the attendance of local job fairs sponsored or attended by staff from local AJCCs.
4. Develop creative, “outside the box” methods to coordinate with other local agencies to develop strong referral and/or co-enrollment processes to reach more potential job seekers.

# Guiding Principle #3 – Lower Overhead expenditures

If allocated funding levels continue to decline, it will be necessary to continue to reduce overhead costs to sustain funding for staff who provide services to clients. Bidders who proposed creative solutions to spend more money on staff-providing client services and on training will receive additional points in the RFP scoring.

To encourage the reduction in overhead costs, the RFP includes:

1. No specific requirement on the number or location of physical sites, so long as every WANB County has access to workforce services (see Guiding Principle #1 point #4, below).
2. Provisions to maximize competition in the RFP process.
3. Provisions to encourage consolidation or other cost saving measures among existing service providers.
4. Provisions to ensure there will be a bid for effective workforce services in all WANB counties, not just those with the largest available funding allocations.

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# Guiding Principle #4 – Emphasis on Employer Service Ethos in the Delivery of Career Services.

A key goal of WANB’s workforce development efforts is to increase connections with employers to understand current and emerging business needs and increase awareness of the services that are available to businesses. Bidders who propose an approach to career services that embraces and integrates the role of employers will receive additional points in the RFP scoring.

Examples might include:

1. Working with WANB and fully participating in on and off-site job fairs, career day events, workshops, seminars, and other employment related activities.
2. Utilizing incumbent worker training to increase business competitiveness and employee mobility.
3. Incorporating the concept of having “Industry Sector Specialists” that are focused on delivering WIOA services to assigned industries ([https://skilledwork.org/wp-](https://skilledwork.org/wp-content/uploads/2014/01/One_Stop_Center_Reinvention_0.pdf) [content/uploads/2014/01/One\_Stop\_Center\_Reinvention\_0.pdf](https://skilledwork.org/wp-content/uploads/2014/01/One_Stop_Center_Reinvention_0.pdf))

## SECTION 3: SCOPE OF WORK

For the purposes of this RFP, the scope of work can be broken down into two categories:

* 1. Adult/Dislocated Worker Services; and
  2. Youth Services

## 

## SECTION 3.1 ADULT, DISLOCATED WORKER, PROGRAMS

### Adult and Dislocated Worker Services (Job Seeker Services)

The Adult and Dislocated Worker services expected from this RFP include a variety of actions and components that are intended to provide customers with the preparation for employment. These include:

1. Career services
2. Transitional Jobs
3. Training services
4. Work-Based Training
5. Incumbent Worker Training
6. Supportive Services
7. Follow-up services

WANB understands that Services Providers can offer a vast array of services that are fully allowable in WIOA. But WANB also recognizes that Service Providers may have varying approaches to delivering services, with different mixes, sequencing, intensity, and durations.

WIOA does not dictate what services must be provided to customers, or the sequence of when those services need to be delivered to customers. Instead, the WIOA allows services to be tailored in ways that best matches customer’s needs to accomplish the desired skill gains and employment.

WIOA does however expect the services to follow a plan, that is based on customer assessments and appraisals, which creates an understanding of the customers current situation and needs, and ultimately designs an Individual Employment Plan (jointly created by AJCC staff and the customer), that will transition the customer to viable employment outcomes.

DOL-ETA’s [TEGL 19-16 (Guidance on Services provided through the Adult and Dislocated Worker](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=3851) [Programs under the Workforce Innovation and Opportunity Act](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=3851) is a comprehensive description of the service “tools” at the disposal of Service Providers. Responders should become familiar with these service interventions in their proposals regarding how they may pattern delivery.

Responders should discuss the services they have experiences providing, and how they pair services to customers to best prepare them for employment.

## SECTION 3.2 YOUTH POGRAMS

### Integrating Service Delivery Model with the Youth System

Under WIOA, there is an increasing alignment between the Adult and Youth workforce development systems, including the overlap in age groups served (18–24-year old's) and nearly identical performance metrics. In addition, WIOA calls for youth programs that focus on connections between WIOA funded youth programs and the One-Stop system operated through AJCCs.

The youth system focuses primarily on serving out of Out-of-School Youth (18-24 year olds); however, successful bidders may also provide services to In-School Youth (14-21 year olds) within limitations ([see WANB Youth Policy, including expenditure requirements](https://www.workforcealliancenorthbay.org/wp-content/uploads/2021/04/42.-Youth-Program.pdf)).

While both age groups may be served with WIOA Youth funding, the goals of the program are the same—to access high school dropout recovery programs, explore career pathways, assist with understanding of local and regional labor markets and job opportunities, improve access to occupational/technical skills training and post-secondary education, and to provide opportunities for paid, work-based learning tied to a systematic approach that offers youth a comprehensive set of service strategies.

### Youth Services

A fundamental principle of the WIOA youth program is to ensure that every participant engages in an objective assessment of their aptitudes, skills, and abilities. The results of this assessment are then used to develop an Individual Service Strategy (ISS) that links to one or more performance indicators as described in Section 116(b)(2)(A)(ii) of WIOA and identifies career pathways that include education and employment goals, appropriate achievement objectives, and outlines the appropriate mix of services to meet the education and employment goals.

The ISS shall outline the appropriate mix of services that when appropriate include as many of the necessary 14 Youth Program Elements as outlined in WIOA. For additional information, access the Employment Development Department’s [Workforce Services Directive WSD 17-07](https://edd.ca.gov/Jobs_and_Training/pubs/wsd17-07.pdf) and the Department of Labor’s [Training and Employment Guidance Letter TEGL 21-16](https://www.dol.gov/agencies/eta/advisories/training-and-employment-guidance-letter-no-21-16).

*While all 14 of these program elements must be “made available” to youth enrolled in the WIOA program, there is no requirement that all elements be provided and/or paid for with WIOA funds.*

Successful bidders are encouraged to include strategies to leverage partner resources to assist with or provide some of the elements.

## SECTION 3.3 PROGRAM PERFORMANCE

WIOA establishes primary indicators of performance for all programs (Adult, Dislocated Worker, and Youth). Successful bidders must perform to the levels of performance negotiated between the State of California and WANB for each program and strive to exceed those goals.

For detailed information on each performance standard, access the Department of Labor’s [Training and Employment Guidance Letter TEGL 10-01, Change 1](https://www.dol.gov/agencies/eta/advisories/training-and-employment-guidance-letter-no-10-01).

|  |
| --- |
| *The negotiated performance goals are unknown at the time we released the RFP but we have taken a conservative approach and rounded them up to a level that we believe may be close to what they will be. Accordingly, these numbers are for planning purposes so respondents to the RFP can consider operational components that may best reach the estimated goals. The Service Provider contracts will be written with the actual goals and updated as needed when those goals change throughout the term of the contract.* |

Adult Program

* Employment Rate in the Second Quarter After Exit 80.0%
* Employment Rate in the Fourth Quarter After Exit 75.0%
* Median Earnings in the Second Quarter After Exit $8,000
* Credential Attainment Within a Year After Exit from the Program 60.0%
* Measurable Skills Gain 59.0%

Dislocated Worker Program

* Employment Rate in the Second Quarter After Exit 80.0%
* Employment Rate in the Fourth Quarter After Exit 75.0%
* Median Earnings in the Second Quarter After Exit $8,500
* Credential Attainment Within a Year After Exit from the Program 60.0%
* Measurable Skills Gain 63.0%

Youth Program

* Education and Employment Rate in the Second Quarter After Exit 71.0%
* Education and Employment Rate in the Fourth Quarter After Exit 70.0%
* Median Earnings in the Second Quarter After Exit $4,000
* Credential Attainment Within a Year After Exit from the Program 56.0%
* Measurable Skills Gain 52.0%

## SECTION 3.4 CONTINUITY OF SERVICE

Successful bidders will be expected to continue serving participants who were enrolled in previous year(s) if they have not been exited or already completed the mandatoy followed up.

New Service Providers must assure that original plans of service for those participants will be followed without interruptions, or with modifications for good reason in collaboration with the participant.

The costs of delivering services to existing (carried in) and new participants will be financed by the contract budget. WANB cannot make payment for any transition made prior to the start date of the contract.

If any new Service Provider is selected through this RFP, WANB will commit to assist in the transition as much as possible.

## SECTION 3.5 FOR PROFIT

Successful bidders proposing “for profit” contracts must propose reasons and justifications of profit and include a narrative that contains the profit expectations (limited to 2 pages).

|  |
| --- |
| *Profit margins are separately negotiated between the respondent and WANB. The negotiated amount must be ratified by the WANB Governing Board. In no event shall profit exceed 10% of the reimbursable cost, and profit will be set at a rate that measures the level of risk by the Service Provider, their capital investments into the WANB program, and industry standards. It is up to the Service Provider to articulate those factors.* |

With regard to the separately negotiated profit, at a minimum, WANB will make earnings of profit contingent on the Service Providers attainment of WIOA performance measures and expenditure requirements (including minimum expenditures on direct training in the Adult and Dislocated Worker programs and the minimum expenditures on work-based learning activities in the Youth program). Criteria for profit will be reviewed and included in the contract negotiation process.

Failure to meet the measures will reduce or eliminate the earnings of profit.

## SECTION 4: PROPOSAL FORMAT

Bidders must follow the following guidelines for each section below when submitting proposals. Failure to follow these formatting requirements may result in the proposal being considered non-responsive.

## SECTION 4.1 PROPOSAL REQUIREMENTS

The proposal will consist of the following components:

1. **A Cover Page**, including the original signature of an individual authorized to bind the respondent in a formal agreement, noting:
   1. The name, address, telephone, and facsimile number of the organization submitting the proposal.
   2. The name, title, telephone number, and e-mail address of the individual signing the proposal, authorized to submit the proposal by the responding agency.
   3. The name, title, telephone number, and e-mail address of the individual to contact regarding the proposal contents (if different from the individual signing the proposal).
   4. The type of organization (CBO, public or private educational entity, governmental entity or department, private-for-profit entity, etc.).
   5. The WANB county or counties for which the respondent proposes to provide WIOA services.
   6. The program populations the respondent proposes to serve (Adult Job Seekers, Dislocated Worker Job Seekers, Youth Services).
2. **A Table of Contents** with sequentially numbered page(s) where each item of the proposal can be found (Note the limit is 40 pages.), and a brief summary of all attachments to the proposal. (separately numbered)
3. **Adult, Dislocated Worker and Employer Programs**
   1. **Program Narrative** (Adult and Dislocated Workers). (*see section 4.2 and 4.2.1 below*)
      1. Organizational structure and experience
      2. Innovations in service delivery
      3. Strategies for serving the target population
      4. Cost-effective access points, infrastructure and/or transition plan
      5. Partnership and collaboration
   2. **Participant Plan** forms for Adults, and Dislocated Workers, programs.
   3. **Budget** forms and budget narrative for Adults, and Dislocated Workers.
   4. **Flow chart summarizing client flow** through the system for Adult and Dislocated Worker Services.
   5. **A county or regional map** showing the proposed location of each Comprehensive, Affiliate and/or Special AJCC location.
4. **Youth Programs and Services**
   1. **Program Narrative** (Youth Program).
      1. Organizational structure and experience.
      2. Innovations in service delivery.
      3. Strategies for serving the target population.
      4. Cost-effective access points, infrastructure and/or transition plan.
      5. Partnership and collaboration.
   2. **Participant Plan** form.
   3. **Budget** form.
   4. A **flow chart summarizing youth client flow** through the system.

### Respondent Assurances

The individual signing this document on behalf of the respondent certifies to the best of his/her knowledge and belief, that:

1. The respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency.
2. The respondent is aware of the requirements of the ADA, is in compliance with the requirements, and will provide safe and easily accessible locations for job seeker and employer programs.

*These assurances are included on the Cover Page.*

## SECTION 4.2 ADULT, DISLOCATED WORKER, PROGRAM AND FINANCIAL NARRATIVES

The program narrative will consist of two parts.

The first part will be a *Program Plan Narrative* which will address the Respondent’s organizational structure, previous experience, and plan for providing services to adults, and dislocated workers in a specific county (or counties).

The second part will be a *Financial Narrative* which will address the Respondent’s financial system and planned budget. Because WANB contracts are cost reimbursement types, the respondent must provide assurances that they have the financial capability to continue operations within the framework of WANB’s Cash Draw system.

It is assumed WANB and the Respondent both have working knowledge of the Workforce Innovation and Opportunity Act (WIOA). WANB is expecting a brief narrative outlining plans for providing services to customers through the AJCC - One Stop Career Center within the County/Counties that the respondent is offering to serve, within the framework of the Workforce Innovation and Opportunity Act.

## SECTION 4.2.1 PROGRAM NARRATIVE

Respondents must address the following sections in the proposal narrative:

### Organizational Structure and Experience

* Describe the organizational structure, specifically as it relates to experiences and abilities to provide cost effective, efficient, high quality WIOA Adult and Dislocated Workers and Youth services for job seekers.
* Describe the qualifications and resumes, including education and training, for key positions staffed at proposed AJCC locations and program population(s) and the functions these staff will be performing.
* Describe the approach for recruitment, training and support for program staff. Including minimum qualifications and experience for specific job classifications.
* Attach organizational charts, one showing the leadership of the organization and another indicating how the AJCC(s) will be staffed, including the titles and programs to which staff members will be dedicated. If staff will be split between programs and functions, the estimated percentages should allocate their time.

### Innovations in Service Delivery

The AJCC operator is required to provide a wide variety of services, that include but are not limited to career services, connecting job seekers to training, and follow-up services. Innovation in service delivery is defined by the approach, resources, and strategy a respondent may plan to use implementing each program’s required elements.

* Use specific examples to describe the service delivery strategy and how the organization will offer an innovative and/or unique approach to providing the required program services and the anticipated impact of these strategies on the participants, employers and staff.
* Describe the plan to provide continuous improvement in service delivery.
* Describe how you as the Service Provider will facilitate the connection between services and WANB priority industry sectors and in-demand occupations.
* Describe how the organization will manage the administration of training funding in an efficient and effective way.
* Describe how your organization will work with the One Stop Operator and required WIOA partners to share more than just infrastructure. Provide examples of how partners who provide same and similar services to customers, who are eligible for multiple programs, can be served using joint resources. WANB wants to hear ideas and historical success in resource leveraging beyond simple co-location and minimal infrastructure agreements.

### Strategies for Serving the Target Population

* Describe how the service delivery strategy will be responsive to the specific needs of the population in general and in each county/region (i.e. cultural demographics, justice-involved customers, individuals with disabilities, older workers, pregnant or parenting, those with mental and behavioral health needs and other populations with barriers to employment). Include a narrative about your proposed outreach and recruitment methods for these populations.
* Describe your plan to obtain, track, measure, report, and improve customer satisfaction for both job seekers and employers.
* Describe program conventions that can be used when customer flow rises or falls, to ensure that WIOA funding is returning high value. Examples might be that when caseloads are low, outreach is elevated; or when customer flow is so high the services are being delayed, that changes including bulk delivery to groups might be instituted that are responsive service needs. WANB is looking for systems that can be nimble and move capacity to where it has the greatest impact.

### Partnership and Collaboration

* + Describe what other meaningful community partnerships your organization will consider that supports program goals and bring specific benefits to customers other than the WIOA required AJCC partners.
  + Describe plans for creating partnerships to offer effective supportive services and maximize the value of services provided to customers that will address barriers to employment in their county and/or region.

### Program Services Plan and Experience

Describe plans and your organization’s experience for providing workforce preparation and related services to adult and dislocated worker job seekers through an AJCC/One Stop Employment Center.

Please include your plans for:

1. Providing WIOA type programs and services to job seekers, the provision of basic and individual career, and training services, as defined in identified in Section 134 of the Workforce Innovation and Opportunity Act, and related Federal Regulations*.*
2. Providing Comprehensive Career Services and developing competency-based Individual Employment Plans pursuant to Sections 134 of the Workforce Innovation and Opportunity Act. Include a brief discussion of the qualifications of staff that will be providing these services.
3. Providing Case Management services pursuant to carrying out the requirements in Section 134 of the Workforce Innovation and Opportunity Act.
4. Coordinating service delivery with other community entities and services who meet the partnership requirements for adult programs addressed in Section 121 of the Workforce Innovation and Opportunity Act.
5. Providing Follow-up Services for registered participants placed in unsubsidized employment, as required in the Workforce Innovation and Opportunity Act.
6. Plan for how you will collect and track, measure, report, and act upon customers’ satisfaction indicators.
7. If there is additional information you would like to share about your proposed services to Adult and Dislocated Workers? Briefly describe them.

### Employer Connections

* + Describe current relationships your agency has with employers in key industry sectors, including strategies you might employ to develop relationships. And how these employer relationships will add value to the adult and dislocated worker programs.
  + Describe past outcomes and how you have developed internships, occupational skill training, apprenticeships, placement in employment, and/or other work-based learning outcomes with employer partners.
  + Describe your approach to job placement and how your agency will identify employment and work-based learning opportunities for program participants.

### Job Seeker Services Summaries

Detail anticipated service units for the three program years for the contract. Include an itemization of the anticipated numbers that will receive certain categories of service.

*Note, although the Participant Plan forms are for one year, please discuss your vision for the 3-year contract cycle.*

### Adult/Dislocated Worker Job Seekers

Detail the total planned service units, and the anticipated number of customers to utilize Career Services and Training Services.

## SECTION 4.2.2 FINANCIAL PLAN NARRATIVE

### Accounting and Operational Controls

Briefly describe your organization’s current financial accounting system, including your accounting methods and procedures, your internal control procedures, and your procurement procedures. (Do NOT attach financial procedures manuals or other detailed documents—a brief description will suffice.)

### Current Audit Status

Include a copy of your most recent audit report’s opinion statement and accompanying management letter with this proposal. (This will be an attachment and not counted against the page limit of the RFP.)

### Adult and Dislocated Worker Budget Forms and Budget Narrative

Please refer to Section 1.7 for estimates of funding available for a particular county, broken out by funding source for Program Year 2025-2026.

In the accompanying Budget Narrative, provide a brief description of the costs charged to each item on the Budget Form. Skip an item only if no costs will be charged to this item.

Again, although the funding amounts are for one year, this is a 3-year contract, so the narrative should address the contract cycle.

*The Budget Narrative should immediately follow the Budget Forms in your proposal package.*

### Operating Costs

The total budget amount must equal or be less than the estimated funding allocations listed above.

* Wages and Fringe – List by Job Title and FTE (full-time equivalency). *Do not forget to include a job description for each position in the attachments to this proposal.* This line item includes salaries and benefits.
* Advertising – This item includes “outreach and dissemination of information.” Describe efforts to reach specific target populations.
* Audit
* Copying/Printing – *Note: This item includes copying/printing costs associated with participant information/referral material.*
* Dues/Memberships – Provide examples of the types of organizations and associations.
* Equipment (Lease/Purchase/Maintenance) – Include in this item anticipated costs for the lease, purchase, and maintenance of equipment. Include a description of the type of equipment that is planned to be purchased or leased, and the estimated cost associated with each item. If your agency expects to furnish some equipment, please indicate in the narrative what and the purpose. These will be recognized as in-kind and may add points to the RFP.
* Facility Rental/Maintenance – Include the following estimates, which are the current costs that have or are currently being negotiated for the four comprehensive AJCC locations:

|  |  |
| --- | --- |
| Napa | $ 2,407 per month |
| Marin | $ 2,627 per month |
| Lake | $ 1,750 per month |
| Mendocino | $ 2,085 per month |

* Insurance – Include information regarding the types of insurance (e.g., general liability, Director and Officer’s Insurance, etc.). Do NOT include health or disability insurance in this line item (That information should be included in the description of the personnel charges listed above under wages and fringe).
* Legal Fees – This should be legal fees needed for the WANB contract and cannot include ongoing legal fees related to non-WANB operations. Please describe any ongoing workforce and training litigation you are currently having.
* Meeting Room Rental
* Postage
* Publications/Subscriptions – Provide detail of anticipated publications and subscriptions.
* Staff Development – Training and continuing education for staff is encouraged. Provide details of the type of activities planned for staff development/continuing education.

*Please include in your financial narrative the expectations of training needed to onramp staff that will be providing services to customers at the AJCC, including an estimate of when that staff will have adequate training to carry out your vision of carrying out the Service Provider functions.*

* Staff Travel – Includes local travel and charges related to out of area staff development. A specific budget line should be used for conference attendance that may be limited.
* Supplies – This category is for office supplies. Do not include supplies/inventories/ testing materials directly related to participant assessment.
* Telephone/Communications
* Utilities
* Other – Detail any anticipated charges to this category.

### Direct Job Seeker Costs

Detail the amount of planned direct job seeker expenses *(WANB is interested in the overall percentage of funding your entities plan to spend on “direct job seeker expenses” (OJT, Tuition, Customized Training, etc.)).* These are expenses incurred on behalf of a job seeker participant that are paid to a third party, and are not already included in personnel, facility or other operating expenses.

Provide a description on the Budget Narrative for amounts entered in each of the categories on the budget form, consistent with the Program Narrative section of your proposal.

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## SECTION 4.3: YOUTH PROGRAMS

The program narrative will consist of two parts. The first part will be a *Program Plan Narrative* which will address the Respondent’s organizational structure, previous experience, and plan for providing services to youth in a specific county (counties). The second part will be a *Financial Narrative* which will address the Respondent’s financial system and planned budget.

When addressing each area, do not quote the Workforce Innovation and Opportunity Act and/or corresponding regulations. WANB is expecting a brief narrative outlining your plans for providing services to youth customers through the One Stop Career Center within the County/Counties you are seeking to obtain a Service Provider contract, within the framework of the Workforce Innovation and Opportunity Act.

## PROGRAM PLAN NARRATIVE

### Organizational Structure and Experience

* Describe your organizational structure, specifically as it relates to your ability to provide cost effective, high quality WIOA programs and services to youth.
* Describe the qualifications and resumes, including education and training, for all key positions staffed at their proposed AJCC locations and which program they will be assigned to. Also describe the approach for recruitment, training of program staff.
* Describe your experience providing WIOA type programs and services to youth with barriers to employment. See the WANB [Youth Policy](https://2zkhmd254nmz2jprye2auttj-wpengine.netdna-ssl.com/wp-content/uploads/2019/11/Youth-Program-Eligibility.pdf) that includes a list of barriers under the items B and C of the “Eligibility for Youth Services” section.
* Describe your experience providing objective assessments and developing Individual Service Strategies pursuant to Sections 129 (c) of the Workforce Innovation and Opportunity Act. Include a brief discussion of the minimum qualifications of staff that will be providing these services.
* Describe your experience and the controls you use to meet the 20% Work Experience requirement.
* Describe your experience conducting programs and services to:
  1. place youth in employment and/or education.
  2. assist youth with the attainment of a degree or certificate; and
  3. assist youth to obtain measurable skills gains.
* Describe your experience providing appropriate supportive services to youth enrolled in the program including the types of services being provided and when/why they are provided.
* Describe your experience coordinating service delivery with other community entities whose involvement are essential in meeting the requirements for youth programs outlined in Section 129 of the Workforce Innovation and Opportunity Act.
* Attach organizational charts, one showing the leadership of the organization and another indicating how the AJCC(s) will be staffed, including the titles and programs to which staff members will be dedicated. If staff will be split between programs, the anticipated percentage allocation must be explained, as well as strategic decisions that will drive change when and where necessary.

### Innovations in Service Delivery

* Describe how the service delivery strategy will be customized and responsive to meet the specific needs of the barriered population in each county/region.
* Using specific examples, describe the service delivery strategy and how your organization will offer an innovative and/or unique approach to providing the required youth program services.
* Describe strategies to increase youth customers’ access to services across the region and/or county(s) you are requesting to serve, particularly the use of electronic or online tools.

### Strategies for Serving the Target Population

* Describe the demographics and characteristics of the targeted county(s) to be served and any potential challenges (with typical solutions) that may arise in engaging and enrolling this population.
* Describe the plan to identify, recruit, and enroll Out of School Youth into the program.
* Describe the youth outreach and recruitment strategy that is responsive to the unique needs of each county and/or region. This strategy includes, but is not limited to, community outreach, social media, events and other activities. Be specific and include what existing resources/strategies will be leveraged to achieve recruitment goals.
* Describe the plan to identify, recruit and enroll In-School-Youth into the program. Include the percentage of youth funding you expect to spend on In-School-Youth in your narrative.

### Cost-Effective Access Points and Transition Plan

For respondents proposing any changes to the current AJCC youth program location(s):

* Evaluate the location and level of access of the current AJCC youth program and explain how the alternate or additional locations would provide benefits to the county(s). If this action will result in additional lease or rental cost, you must describe how that might be financed by the existing lease cost for each AJCC provided in this RFP.
* Describe the plan to maintain and/or transition the current AJCCs youth staff, and/or how to implement additional access points and/or partnerships within the first year of operation. This must include a transition plan (if applicable) from the current operator and any expected ramp up time as a result.
* If partners are involved in providing additional access points, respondents must describe potential partners’ roles and responsibilities and list specifically what leverage, additional funding and/or in-kind resources they will provide.
* Attach MOUs and/or Letters of Support demonstrating specific partner commitments and resources the partners agree to provide.

### Partnership and Collaboration

Not including the required MOU with AJCC partners, respondents should describe what other meaningful community partnerships their organization will provide that support program goals and bring specific benefits to customers.

* Describe any partnerships that support jobs, internships, and educational opportunities for youth and young adults, such as government agencies, education systems, community/faith-based organizations and other partners that serve similar populations and can support the goals of the programs.
* Describe collaborative efforts for serving youth with disabilities.
* Describe meaningful partnerships with eligible training providers, institutions of higher education, and employers from in-demand/priority sector industries.

### Youth Program Services

Describe your plan for providing services to youth in the County/Counties targeted by the proposal. At a minimum, address the following in your narrative:

1. Recruitment strategies of effective outreach, engagement, enrollment, and retention of youth.
2. Screening, Intake, and Referral
3. Objective Assessment/Individual Service Strategies/Case Management. The proposal for providing intensive case management and supportive services to help youth overcome complex barriers, successfully complete the program, and retain employment.
4. Required Program Elements of a WIOA Youth Program (WIOA, Section 129). The proposal for providing:
   * Tutoring, study skills, instruction leading to a high school diploma or GED, and dropout prevention
   * Alternative secondary school services, or dropout recovery services, as appropriate
   * Paid and unpaid work experience, including summer employment opportunities
   * Occupational skills training, as appropriate
   * Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster
   * Leadership development opportunities, including community service and peer- centered activities encouraging responsibility and other positive social and civic behaviors
   * Supportive Services (include information on additional resources you may leverage to meet a Youth’s supportive service needs)
   * Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months
   * Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate
   * Follow-up services for not less than 12 months after the completion of participation, as appropriate
   * Financial literacy education
   * Entrepreneurial skills training
   * Services that provide labor market and employment information about in- demand/priority industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services
   * Activities that help youth prepare for and transition to postsecondary education and training

### Employer Connections

* + Describe your current relationship with employers in key industry sectors or strategies you might employ to develop such relationships. And how these employers will benefit the youth program.
  + Describe past outcomes and how you have developed internships, occupational skill training, apprenticeships, other work experience, placement in employment, and/or other work-based learning outcomes with employer partners.
  + Describe your approach to job placement and how our agency will identify employment and work-based learning opportunities for program participants.

## SECTION 5: RATING CRITERIA

## 

## RATING CRITERIA

All proposals received will be evaluated by an RFP Evaluation Committee. During the evaluation process, WANB may require a respondent's representative to answer specific questions orally and/or in writing. Once a finalist or group of finalists is selected, additional information may be required. The most qualified proposals will be presented to the WANB WDB along with staff recommendations. The RFP Evaluation Committee’s scoring and evaluation will carry significant weight, but the opinions of staff will be included in the analysis provided to the WDB.

### Bids will be evaluated as follows:

Review for Responsiveness: Proposals submitted will be evaluated regarding the sufficiency of the information listed under the section entitled “Submission Requirements.” Failure to submit all necessary information as requested, or failure to follow the format outlined in the previous section, may result in rejection or lower scoring of the proposal.

Detailed Criteria: Each proposal will be evaluated based on an assessment of the information provided in response to the RFP. Only information submitted as part of this RFP will be considered in the review process.

**Selection Criteria to be Evaluated:**

### Program Services Approach:

|  |  |  |
| --- | --- | --- |
| • | Organizational Structure and Staff Experience | Maximum 10 Points |
| • | Innovation in Service Delivery designs | Maximum 10 Points |
| • | Strategies for Serving the Target Population | Maximum 20 Points |
| • | Cost effective access points and infrastructure | Maximum 15 Points |
| • | Partnerships and Collaboration | Maximum 5 Points |
| • | Program Services Plan and Experience (Past Performance Record) | Maximum 20 Points |
| • | Budget and Fiscal Management | Maximum 20 Points |
| **Total** | | Maximum 100 Points |

It should be noted that the RFP evaluation team will be a group of professionals that understand and are familiar with the rules and regulations of WIOA and have familiarity with operational decisions that can make differences in the delivery of services. So, including the requirements outlined above, proposals are evaluated with these considerations in mind:

* WANB will value respondent's that can show ways that increase service counts, increase the value and relevance of services, and accomplishes measurable outcomes. Respondent's should demonstrate that they will do more than passively keeping the doors open. Instead, WANB will look for proactive strategies that attract customers, increases positive impact to the community, leverages funding by joint efforts of the Service Provider and AJCC partners, provides meaningful service that meet the expectations and needs of customers (job seekers and employers), and achieve sector related successes.
* Respondent's demonstrating the ability to provide the required services at a reasonable cost. Costs will be evaluated based not only on competitiveness of fund usages, but equally as important, the potential of benefits realized (e.g., costs per participants).
* Respondent's ability to demonstrate a successful history of outcome-based performance.
* Respondent's ability to meet the start date of July 1, 2025
* Respondent's record of integrity, business ethics, and fiscal accountability, including:
  + The agency’s efforts to recover debts.
  + The agency’s ability to fund “cost reimbursable” operations using capital or lines of credits to operate within the parameters of the WIOA cash draw system.
  + The absence of fraud or criminal activity.
  + The absence of serious administrative deficiencies, such as failure to maintain a financial management system in compliance with OMB audit requirements.
  + Historically low incidents and when applicable, timely reconciliation of findings or questioned costs resulting from audits or monitoring.
  + Provision of a robust array of services to applicants.
  + Timely and accurate submission of required reports.
  + Proper reporting.
  + The necessary organizational experience, accounting, and internal controls; and
  + The technical skills to perform the work.

## SECTION 6: DISCLAIMERS AND GENERAL PROVISIONS

ADDENDA TO THIS REQUEST FOR PROPOSALS

At the discretion of WANB, if it becomes necessary to revise any part of this RFP, an addendum will be provided to all known recipients of this RFP and posted on WANB’s RFP website. Any clarification will become an addendum to this RFP.

Respondents are responsible for checking the website frequently to remain informed about the procurement process and other information that may affect this RFP (e.g. WIOA reauthorization, changes to performance measures, and revisions to the timeline).

## RIGHT TO CANCEL

WANB reserves the right to cancel all or any part of this RFP at any time without prior notice and reserves the right to modify the RFP process and timeline as deemed necessary.

## CONFLICT OF INTEREST

Neither WANB staff nor Workforce Development Board members will participate in the evaluation of proposals, discussions and/or voting to fund proposals if that staff or member has a conflict of interest or has had any communication with the respondent regarding this RFP.

## APPEALS PROCESS

Only respondents to this RFP may appeal the results if they believe the procurement process was violated in some manner, and/or Federal, State, and/or WANB procurement guidelines have been violated. An appeal will not be allowed to contest individual scores, the rating system, disqualification, or dissatisfaction with the evaluation results.

The appeal process is:

* A written letter of appeal will be sent [*dorlando@workforcealliancenorthbay.org*](mailto:dorlando@workforcealliancenorthbay.org)including evidence for appeal and the specific relief sought.
* The written appeal must be received by WANB within ten business days from the date the RFP award is posted on WANB’s website.
* An appeal review panel will be appointed by the WDB Executive Committee.
* The panel will review the appeal and collect information.
* Once all the information is gathered and reviewed, the panel will issue a written decision to the appellant and the WDB. This action typically can occur within 30 days from the appeal panel’s finding but may be extended if fact finding is delayed by the appellant.
* The decision of the appeal review panel will be final.

GENERAL DISCLAIMERS

* + This RFP does not commit the WANB Workforce Development Board (WDB) to award a contract.
  + No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies under Workforce Innovation and Opportunity Act.
  + Any costs incurred for transitions from an old Service Provider to a new Service Provider that is conducted prior to the beginning of the contract will not be paid by this award.
  + All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to the WANB and be subject to disclosure under the Freedom of Information Act.
  + Formal notification to award a contract and the actual execution of a contract are subject to the following: receipt of Workforce Innovation and Opportunity Act funds by WANB, and continued availability of Workforce Innovation and Opportunity Act funds. Any changes to the Workforce Innovation and Opportunity Act program, funding level or board direction may result in a change in contracting.
  + Proposals selected for funding must comply with WIOA Law and a regulation.
  + WANB may require selected proposers to attend oral interviews.
  + Additional funds received by WANB may be contracted by expanding existing programs or by consideration of proposals not initially funded under this RFP. These decisions shall be at the discretion of the WANB Executive Director.
  + Any proposal approved for funding is contingent on the results of a pre-award site visit that may be conducted by WANB staff. This site visit will establish, to WANB’s satisfaction, whether the Service Provider is capable of conducting and carrying out the provisions of the proposed contract. If the results of the site visit indicate, in the opinion of WANB, that the bidder may not be able to fulfill contract expectations, WANB reserves the right to make a recommendation to the WDB and GB to not enter into contract with the organization, regardless of WANB initial approval of the proposer’s proposal.
  + All proposers must ensure equal opportunity to all individuals. No individual in the WANB Regional area shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any Workforce Innovation and Opportunity Act funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, or political affiliation or belief.
  + All proposers must ensure access to individuals with disabilities pursuant to the Americans with Disabilities Act.
  + Proposers will allow local, state, and federal representatives access to all Workforce Innovation and Opportunity Act records, program materials, staff, and participants. In addition, proposers are required to maintain all Workforce Innovation and Opportunity Act records for three years, beginning on the last day of the program year (29 CFR Part 95).
  + The contract award will not be final until WANB and the proposer have executed a mutually satisfactory contractual agreement. WANB reserves the right to make an award without further discussion of the proposal submitted. No program activity may begin prior to final WANB approval of the award and execution of a contractual agreement between the successful bidder and WANB.
  + Respondents are advised that most documents in the possession of WANB are considered public records and subject to disclosure under the federal and state public records laws.

**PROPOSAL ORDER**

The Proposal should be arranged in the following way to accommodate the evaluation. If items are detailed in the Adult and Dislocated Section that are the same as those that need to be detailed in the Youth Section, please explain and reference the pages rather than repeating them.

* Cover Page
* Table of Contents
* Adult and Dislocated Worker Narrative
* Organizational Structure and Experiences
* Innovations in Service Delivery
* Strategies for Serving the Target Population
* Cost-Effective Access Points
* Transition Plan if applicable
* Partnerships and Collaborations
* Program Services Plan and Experience
* Job Seeker Services
* Financial Narrative
* Completed Participant Plan forms for Adult and Dislocated Worker
* One for each County you are competing for
* Completed Budget Form for Adult and Dislocated Workers
* One for each County you are competing for
* Flow chart summarizing typical client flow
* Youth Program Narrative (if any of these are part of the Adult and DW portions, please refer to them and not repeat)
* Organizational Structure and Experience
* Innovations in Service Delivery
* Strategies for Serving the Target Population
* Cost-Effective Access Points
* Transition Plan if applicable
* Partnership and Collaborations
* Youth Program Services
* Employer Connections
* Financial Narrative
* Completed Participant Plan form for Youth
* One for each County you are competing for.
  + Completed Budget Form
* One for each County you are competing for
  + Flow chart summarizing typical client flow

# Proposal Cover Page

Prime Respondent’s Name:

If multiple agencies, Name other agencies and partnership status:

Type of Agency  Community Based Organization  Post-Secondary Education

Governmental Agency  Private Non-Profit  Private For-Profit

Other (describe)

Prime Respondent’s Address:

Contact Person:       E-Mail Address:

Telephone number:

Counties This Proposal Covers:  Napa  Marin  Lake  Mendocino

Programs This Proposal Covers  Adult  Dislocated Worker  Youth

|  |  |
| --- | --- |
|  | Respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency. |
|  | The respondent is aware of the requirements of the ADA, is in compliance with the requirements, and will provide safe and easily accessible locations for job seekers and employers. |
|  | The respondent is financially viable and acknowledges it can operate programs and pay salaries and other expenses within the WANB cash management and payment of invoice system. |

Signature of Authorized Representative of Prime Respondent:

Signature, Title, Organization

Typed Name:       Date Signed:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Adult Participant Plan Napa** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 23 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,000 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 59% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Adult Participant Plan Marin** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 78 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,000 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 59% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Adult Participant Plan Lake** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 9 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/a |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,000 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 59% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Adult Participant Plan Mendocino** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 10 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/a | N/a |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,000 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 59% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Dislocated Worker Participant Plan Napa** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 7 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,500 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 63% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Dislocated Worker Participant Plan Marin** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 5 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,500 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 63% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Dislocated Worker Participant Plan Lake** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 6 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,500 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 63% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Dislocated Worker Participant Plan Mendocino** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 3 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 80% |  |  |  |
| B. Education & Employment Rate in the 4th Qtr. | 75% |  |  |  |
| C. Median Earnings in 2nd Qtr. | $8,500 |  |  |  |
| D. Credential Attainment Withing a  Year after Exit | 60% |  |  |  |
| E. Measurable Skills Gain | 63% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Youth Participant Plan Napa** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 8 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 71% |  |  |  |
| C. Education & Employment Rate in the 4th Qtr. | 70% |  |  |  |
| I. Median Earnings in 2nd Qtr. | $4,000 |  |  |  |
| J. Credential Attainment Withing a  Year after Exit | 56% |  |  |  |
| K. Measurable Skills Gain | 52% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number

for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Youth Participant Plan Marin** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 8 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 71% |  |  |  |
| C. Education & Employment Rate in the 4th Qtr. | 70% |  |  |  |
| I. Median Earnings in 2nd Qtr. | $4,000 |  |  |  |
| J. Credential Attainment Withing a  Year after Exit | 56% |  |  |  |
| K. Measurable Skills Gain | 52% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Youth Participant Plan Lake** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 13 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 71% |  |  |  |
| C. Education & Employment Rate in the 4th Qtr. | 70% |  |  |  |
| I. Median Earnings in 2nd Qtr. | $4,000 |  |  |  |
| J. Credential Attainment Withing a  Year after Exit | 56% |  |  |  |
| K. Measurable Skills Gain | 52% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number for the 6/26 quarter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WIOA Youth Participant Plan Mendocino** | | | | |
| **7/1/25 to 6/30/26** | | | | |
| **Organization Name:** | | | | |
| **I. Quarterly Participation (Cumulative)** | | | | |
| Quarter End Date (MM/YY) | **9/25** | **12/25** | **3/26** | **6/26** |
| A. Participants Carried In | 10 | N/A | N/A | N/A |
| B. Participants Enrolled |  |  |  |  |
| C. Participants Exited |  |  |  |  |
| D. Participants Carried Out | N/A | N/A | N/A |  |
| **II. Program Services - Total Participants to Receive the Following Services** | | | | |
| A. Basic Career Services |  |  |  |  |
| B. Individualized Career Services |  |  |  |  |
| C. Training Services |  |  |  |  |
| **III. Performance Goals** | **WANB** | **Projected** |  |  |
| A. Education & Employment Rate in the  2nd Qtr. | 71% |  |  |  |
| C. Education & Employment Rate in the 4th Qtr. | 70% |  |  |  |
| I. Median Earnings in 2nd Qtr. | $4,000 |  |  |  |
| J. Credential Attainment Withing a  Year after Exit | 56% |  |  |  |
| K. Measurable Skills Gain | 52% |  |  |  |

Incorporate the “Carried In” number as provided, and compute the “Carried Out” number for the 6/26 quarter.

**BUDGET AND BUDGET NARRATIVE**

On a separate page:

* provide a narrative discussing how all costs are estimated
* Which costs are direct versus indirect (including major cost allocation methods).
* Include a list of individual staff positions and their functions by program budgeted for each county,
* Include an explanation for all budgeted items of cost.
* Include and estimated usage schedule that shows how the total costs will be distributed to
  + Basic Career Services,
  + Individual Career services,
  + Follow-up services
  + Management of the contract
* Make sure the budget includes 36.24% for Adult and Dislocated Worker Training.
  + The stay restricts 30% of the local area’s WIOA Adult and Dislocated Workers budgets for Training costs. Because WANB uses a share of that to administer the program, the obligation for the Service Provider(s) is to spend 36.24% on Training.
  + Up to one third of that amount (10% of the allotment) can be covered by leveraged funds as defined in Assembly Bill 1149 (chapter 327, Statutes of 2017) EDD Directive [WSD 18-10](https://edd.ca.gov/siteassets/files/jobs_and_training/pubs/wsd18-10.pdf).
  + The above one third is built in “Flexibility” for the Service Provider. When they document Leverage and report it to WANB, those approved Leverage amounts (up to that on third) can be used for other costs that are not Training.
  + But, use of that flexible funding can only occur after the Leverage is approved by WANB.
* Make sure the budget includes 22.22% of the net program Youth funding for Work Experience. The definitions for this can be found in [WSD 17-07](https://edd.ca.gov/siteassets/files/jobs_and_training/pubs/wsd17-07.pdf). The “net” formula subtracts the “administrative” costs used by the local area. WANB has roughly calculated this percentage to be 22.22%.
* Please include your agencies intentions about the extent of qualifying leverage dollars you expect to report. And explain the line items in the budget that will be augmented by the funding that becomes unrestricted when that leveraged is approved.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BUDGET SUMMARY PLAN NAPA** | | | | | | | | |
| **Organization Name:** | | | | | | | | |
| **Project Title: All Programs** | | | | | | | | |
| **7/1/2025 - 6/30/2026** | | | | | | | | |
|  | **Adult** | | **DW** | | **Youth** | | | **Total** |
| **Expenditures:** |  | |  | |  | | |  |
| Staff Salaries |  | |  | |  | | |  |
| Staff Benefits |  | |  | |  | | |  |
| Staff Benefit Rate  (percentage) |  | |  | |  | | |  |
| Staff Travel |  | |  | |  | | |  |
| Operating Expenses |  | |  | |  | | |  |
| Leases |  | |  | |  | | | 28,884 |
| Equipment - Prior  approval required |  | |  | |  | | |  |
| Supportive Services |  | |  | |  | | |  |
| Other (attach detailed  description) |  | |  | |  | | |  |
| Training Costs | 36,776 | | 52,248 | | NA | | | 89,024 |
| Flex Training Costs (Leveraged Resources) | 18,387 | | 26,124 | | NA | | | 44,511 |
| Youth Work Experience | NA | | NA | | 40,964 | | | 40,964 |
| Indirect Costs |  | |  | |  | | |  |
| Indirect rate (percentage) |  | |  | |  | | |  |
| **Total** | 152,250 | | 216,307 | | 184,335 | | | 552,892 |
|  | | Adult | | Dislocated Worker | | | Youth | |
| **Cost per participant** | |  | |  | | |  | |
| **Number of Full-time equivalents (FTEs)** | | Adult & DW | | | | Youth | | |
|  | | | |  | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BUDGET SUMMARY PLAN Marin** | | | | | | | | |
| **Organization Name:** | | | | | | | | |
| **Project Title: All Programs** | | | | | | | | |
| **7/1/2025 - 6/30/2026** | | | | | | | | |
|  | **Adult** | | **DW** | | **Youth** | | | **Total** |
| **Expenditures:** |  | |  | |  | | |  |
| Staff Salaries |  | |  | |  | | |  |
| Staff Benefits |  | |  | |  | | |  |
| Staff Benefit Rate  (percentage) |  | |  | |  | | |  |
| Staff Travel |  | |  | |  | | |  |
| Operating Expenses |  | |  | |  | | |  |
| Leases |  | |  | |  | | | 31,524 |
| Equipment - Prior  approval required |  | |  | |  | | |  |
| Supportive Services |  | |  | |  | | |  |
| Other (attach detailed  description) |  | |  | |  | | |  |
| Training Costs | 57,404 | | 72,122 | | NA | | | 129,526 |
| Flex Training Costs (Leveraged Resources) | 28,701 | | 36,060 | | NA | | | 64,761 |
| Youth Work Experience | NA | | NA | | 50,933 | | | 50,933 |
| Indirect Costs |  | |  | |  | | |  |
| Indirect rate (percentage) |  | |  | |  | | |  |
| **Total** | 237,648 | | 298,582 | | 229,198 | | | 765,428 |
|  | | Adult | | Dislocated Worker | | | Youth | |
| **Cost per participant** | |  | |  | | |  | |
| **Number of Full-time equivalents (FTEs)** | | Adult & DW | | | | Youth | | |
|  | | | |  | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BUDGET SUMMARY PLAN Lake** | | | | | | | | |
| **Organization Name:** | | | | | | | | |
| **Project Title: All Programs** | | | | | | | | |
| **7/1/2025 - 6/30/2026** | | | | | | | | |
|  | **Adult** | | **DW** | | **Youth** | | | **Total** |
| **Expenditures:** |  | |  | |  | | |  |
| Staff Salaries |  | |  | |  | | |  |
| Staff Benefits |  | |  | |  | | |  |
| Staff Benefit Rate  (percentage) |  | |  | |  | | |  |
| Staff Travel |  | |  | |  | | |  |
| Operating Expenses |  | |  | |  | | |  |
| Leases |  | |  | |  | | | 21,000 |
| Equipment - Prior  approval required |  | |  | |  | | |  |
| Supportive Services |  | |  | |  | | |  |
| Other (attach detailed  description) |  | |  | |  | | |  |
| Training Costs | 59,242 | | 38,536 | | NA | | | 97,778 |
| Flex Training Costs (Leveraged Resources) | 29,620 | | 19,268 | | NA | | | 48,888 |
| Youth Work Experience | NA | | NA | | 51,290 | | | 51,290 |
| Indirect Costs |  | |  | |  | | |  |
| Indirect rate (percentage) |  | |  | |  | | |  |
| **Total** | 245,258 | | 159,539 | | 230,802 | | | 635,599 |
|  | | Adult | | Dislocated Worker | | | Youth | |
| **Cost per participant** | |  | |  | | |  | |
| **Number of Full-time equivalents (FTEs)** | | Adult & DW | | | | Youth | | |
|  | | | |  | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BUDGET SUMMARY PLAN Mendocino** | | | | | | | | |
| **Organization Name:** | | | | | | | | |
| **Project Title: All Programs** | | | | | | | | |
| **7/1/2025 - 6/30/2026** | | | | | | | | |
|  | **Adult** | | **DW** | | **Youth** | | | **Total** |
| **Expenditures:** |  | |  | |  | | |  |
| Staff Salaries |  | |  | |  | | |  |
| Staff Benefits |  | |  | |  | | |  |
| Staff Benefit Rate  (percentage) |  | |  | |  | | |  |
| Staff Travel |  | |  | |  | | |  |
| Operating Expenses |  | |  | |  | | |  |
| Leases |  | |  | |  | | | 25,020 |
| Equipment - Prior  approval required |  | |  | |  | | |  |
| Supportive Services |  | |  | |  | | |  |
| Other (attach detailed  description) |  | |  | |  | | |  |
| Training Costs | 50,644 | | 37,940 | | NA | | | 88,584 |
| Flex Training Costs (Leveraged Resources) | 25,322 | | 18,969 | | NA | | | 44,291 |
| Youth Work Experience | NA | | NA | | 50,751 | | | 50,751 |
| Indirect Costs |  | |  | |  | | |  |
| Indirect rate (percentage) |  | |  | |  | | |  |
| **Total** | 209,665 | | 157,067 | | 228,380 | | | 595,112 |
|  | | Adult | | Dislocated Worker | | | Youth | |
| **Cost per participant** | |  | |  | | |  | |
| **Number of Full-time equivalents (FTEs)** | | Adult & DW | | | | Youth | | |
|  | | | |  | | |