



**WORKSYSTEMS, INC.
REQUEST FOR PROPOSALS
REGIONAL BUSINESS SERVICES**

PROJECT BACKGROUND

Worksystems, Inc. (WSI) is a nonprofit organization serving the City of Portland, Multnomah and Washington counties. The mission of the organization is to build a comprehensive workforce development system that supports individual prosperity and business competitiveness. To this end, WSI is funding a team of Regional Business Specialists (RBS), to increase the capacity of the WorkSource Portland Metro System to assist business in hiring and training new employees and support job seekers who complete occupational skills training or who would benefit from On-the-Job Training (OJT) opportunities.

The RBS team will work collaboratively within the integrated WorkSource Portland Metro System with Worksystems, Oregon Employment Department, Community Colleges and Community Based Organizations to serve both job seekers and businesses.

SCOPE OF WORK

The successful proposal will address how the contractor will carry out the objectives described in five areas:

1. Job Placement Post-Training: Actively assist Workforce Investment Act (WIA) funded occupational skills training completers to secure employment in training related industries.
2. On-the-Job (OJT) Recruitment/Placement: Utilize On-the-Job Training Agreements as a tool to assist business in hiring and training new employees. RBS will utilize existing templates, policies and procedures to write, manage, monitor and evaluate OJT agreements.
3. Target Industry Expertise: Regional Business Specialists will be based in the WorkSource Centers. Each RBS will specialize in a targeted industry to be determined by the Regional Competitiveness Committee of the Workforce Investment Board. RBS will meet regularly with WSI's Regional Business Services staff, and, at the direction of WSI, will support regional targeted industries. RBS will stay abreast of target industry needs and offer WorkSource solutions to skill panels, industry associations and individual companies.
4. Data Monitoring and Tracking: Accurate and timely data entry in I-Trac and iMatchSkills database systems.
5. Training: Provide training and technical assistance to WorkSource Employment Services staff around 1B training services. RBS will be a resource to WorkSource center staff for the 257-HIRE line.

Funding for the RBS team will span from August 10, 2009 until June 30, 2010. Up to three extensions will be available for subsequent program years at WSI's sole discretion. Subrecipient performance will be a factor considered in agreement extension, as will funding availability.



DELIVERABLES

- 1) The selected contractor will write a minimum of 80 OJT agreements by June 30, 2010.
- 2) The selected contractor will assist all job seekers that successfully complete occupational skills training secure employment to ensure that 80% of job seekers that successfully complete occupational skills training secure employment in a training related industry.

AVAILABLE FUNDS

Funding for this project is estimated at \$675,000 of which \$400,000 will be allocated for the OJT agreements. The remaining \$275,000 will cover at least (4) FTE, administrative and other expenses over the contract period.

PROPOSAL RESPONSE

Proposal response must be single spaced with font size 12 or larger. Proposals must respond to the following:

1. Describe your experience and success conducting similar projects using WIA or other public or restricted dollars. In addition to the program design and delivery discussion, include information as to how you will ensure appropriate accounting practices and fiscal controls are in place to manage the grant and OJT contract development and monitoring. *(30 points - not more than 2 pages.)*

Evaluation Criteria

- Demonstrated experience and past success in meeting contracted expectations and deliverables
- Quality and ability of strategies to achieve outcomes
- Demonstrated sound accounting practices and fiscal controls
- Experience managing the delivery of program activities including administrative responsibility for staff and facilities
- Administrative capacity to comply with applicable contract provisions
- Subcontracting experience

In addition to the question response, supporting administrative capacity documents will be required to be submitted with the proposal. Please see Administrative Capacity Checklist (*Resource Document 3*) for the list of documents that must be submitted along with the proposal response and then follow the instruction in the Proposal Submission section for Administrative Capacity Submission.

2. Describe your strategies for carrying out each of the five (5) objectives stated in the Scope of Work: *(40 points – not more than 5 pages)*

In addition, please respond to the following questions:



- How will you market OJT agreements to business and ensure that, through these agreements, WorkSource customer's training and career goals are met? Include how you plan to track, manage, and monitor OJT agreements.
- Describe your ability to work collaboratively with WorkSource Center staff (Employment Department, WIA, etc) to respond to and meet the needs of business in targeted industries.

Evaluation Criteria

- Quality and ability of strategies to achieve outcomes
 - Demonstration of experience recruiting qualified candidates.
 - Service design is cohesive, realistic, achievable
 - Service design reflects collaboration with key partners
 - Service design is reflective of best practices
3. This project has tight budget restrictions. Address how you will allocate funding for staffing, administration and other expenses based on the stated restrictions of available funds in a budget narrative. In addition please complete the attached budget workbook (*Resource Document 5*). (10 points)

Evaluation Criteria

- Budget workbook and narrative outline a reasonable apportionment of the funds
 - Strategy is cohesive, realistic, achievable
4. A key goal of this project is a quick start-up. Describe the strategy for recruiting and hiring staff to fill the RBS positions. What are the skills and qualifications you will be looking for in the candidates hired as Regional Business Specialists? (20 points -not more than 1 page.)

Evaluation Criteria

- Demonstration of experience recruiting qualified candidates.
- Demonstrated experience and past success in program start-up
- Quality and ability of strategies to achieve outcomes

Proposals must be received by 12:00 p.m. on Friday, July 24, 2009. See "Proposal Submission" section for further details on proposal submission requirements.

PROPOSAL EVALUATION

Proposals will be evaluated by a committee. The successful proposal will be selected based on the scoring using the criteria and point allocation described above under Proposal Response. During the evaluation process, the committee may, at its discretion, request any or all respondents to make oral presentations, which may be considered in making the decision.



Administrative Details

Issuing Organization Worksystems, Inc. (WSI)	Federal Awarding Agency U. S. Department of Labor (DOL)	Available Funds \$675,000
Available Funding Sources American Recovery and Reinvestment Act (ARRA)		
CFDA Numbers ARRA Adult – 17.258 ARRA Dislocated Worker – 17.260	Agreement Form Subrecipient Agreement	
Services WSI is requesting proposals for delivery of Regional Business Services in Region 2 through the WorkSource Portland Metro system comprised of WorkSource Centers. Successful respondents will enter into contract negotiations with WSI based on their proposal and the system design requirements.		
System Structure Region 2 is comprised of three jurisdictions: Washington and Multnomah Counties and the City of Portland. WIA funds are allocated within the Region based on population, including related labor market and demographic factors.		
RFP Term Subgrant agreements awarded through this RFP will be funded from August 10, 2009 through June 30, 2010. Up to three extensions will be available for subsequent program years at WSI’s sole discretion. Subrecipient performance will be a factor considered in Agreement extension, as will funding availability.		
Administrative Requirements All subrecipients must meet a minimum level of administrative and fiscal capacity in order to contract with WSI. To qualify as an RFP respondent, an organization must pass an administrative qualification review. Based on the information presented, reviewers will determine if the organization has the financial capacity to administer a cost reimbursement contract comprised of public funds. WSI will also review for technological capability and verify that neither the organization nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.		
Public Record Disclosure Respondents are advised that most documents in the possession of WSI are considered public records and subject to disclosure under the State Public Records Law (ORS 192.410 - 192.505).		



Inquiries

All inquiries related to this RFP are to be submitted electronically. E-mail inquiries should be identified on the e-mail as “RFP Inquiry” and sent to RBS@worksystems.org. Written questions received after the RFP has been published and before 5:00 p.m., Tuesday, July 21, 2009 will be responded to within 48 hours by posting in the “Questions and Answers” section for this RFP at www.worksystems.org Funding Opportunities section. Questions received after July 21, 2009 will not be answered.

Timeline

Dates	Activity
June 25, 2009	RFP Available on WSI website
July 24, 2009	Proposals and Documentation of Qualifications due at Worksystems, Inc.
July 31, 2009	Evaluation process and recommendation complete
August 3, 2009	Provisional award notification/contract negotiation begins
August 14, 2009	Contract signed
August 10, 2009	Funds Available/Services begin

Cost of Preparing Proposals

Costs for developing the proposals are solely the responsibility of the respondents. WSI will not provide reimbursement for such costs.

Withdrawal

A submitted RFP response may be withdrawn at any time. A written request to withdraw the response must be submitted electronically to: RBS@worksystems.org.

Appeals

The following process has been established to address appeals:

- The appeal must be due to what the respondent considers a flaw in the Evaluation Committee’s funding recommendation process.
- The appeal must be submitted in writing by Wednesday, August 5, 2009. Appeals must be filed with Worksystems, Inc. at RBS@worksystems.org. All appeals are public information.
- The organization/individual filing the appeal must specify the basis of the appeal and provide an alternative the appellant would find acceptable. Proposal rating scores may not be appealed. The mere fact that a proposal was not recommended for funding is also not open to an appeal, nor is a complaint about the amount of funding granted. The appeal must be a violation of the process established for the solicitation.

During any part of the review or consideration, the appellant may be asked to clarify or amplify statements or to provide proof of claims or other statements. Any such requests must be fully



responded to within the time designated by WSI. In the event an appellant fails to respond, the appeal will be dismissed and no further appeal will be accepted.

WSI's Executive Director and Director of Business Operations will review the appeal and issue a written response that is intended as a complete and final answer to the appeal.

Proposal Submission

Regional Employment Services Proposal: The proposals are to be submitted as follows:

- Complete and fax a signed copy of the Regional Employment Services Submission Cover Page (*Resource Document 1*). The Cover Page must be signed by an individual authorized to represent the organization, to act on its behalf and to legally bind it in all matters related to the RFP.
- Submit the proposal – including the Cover Page – in a format compatible to Office 97-2003 to RBS@worksystems.org no later than 12:00 p.m. on July 24, 2009.
- WSI will send a reply to the email acknowledging receipt and that the documents could be opened and viewed.
- It is the respondent's responsibility to ensure the electronic submission was received. If a WSI reply has not been received it is the respondent's responsibility to follow-up with another email or telephone call.

Administrative Capacity Submission: The Administrative Capacity documents must be submitted separately from the proposal – it is a paper submission, and should not be sent electronically – no later than noon on July 24, 2009.

- Include the completed Administrative Capacity Cover Page (*Resource Document 2*) signed by an individual authorized to represent the organization, to act on its behalf and to legally bind it in all matters related to the RFP.
- Include the completed Administrative Capacity Submission Checklist (*Resource Document 3*) and each of the required documents. Where the requested information is included in the body of a document, it should be highlighted or clearly marked for the reviewers.
- If a document has been submitted to WSI since July 1, 2008 or as part of the workforce system procurement of 2008 it may still be valid and able to be used in this RFP review (based on insurance expiration dates, etc.). Please indicate in the response if WSI has a current copy of the document and do not provide a second copy.
- Include one hard copy of all information in a single package – do not include any information that is not specifically requested. Do not send electronic copies of the individual documents.



- Your package must be labeled “Regional Business Services RFP – Administrative Capacity Submission” and be addressed as follows:

Regional Business Services RFP
Worksystems, Inc.
111 SW Fifth Avenue, Suite 1150
Portland, OR 97204

In order to be considered, all documentation – in hard copy – must be received in WSI offices by 12:00 p.m. on July 24, 2009. Any documentation received after the due date will be returned unopened. Qualifications shall remain valid through June 30, 2010. All documents received within the appropriate timeframe become the property of WSI and will not be returned.

I. Resource Documents

The following documents are posted with this RFP as separate Resource Documents, labeled as shown:

- Resource Document 1: Regional Business Services Submission Cover Page
- Resource Document 2: Administrative Capacity Submission Cover Page
- Resource Document 3: Administrative Capacity Checklist
- Resource Document 4: WSI Subrecipient Terms and Conditions
- Resource Document 5: Budget Narrative and Workbook