CHICAGO COOK WORKFORCE PARTNERSHIP
LOCAL WORKFORCE INNOVATION AREA #7

REQUEST FOR PROPOSALS
FOR

Delegate Agencies
WIOA Title I Services

CHICAGO COOK
WORKFORCE PARTNERSHIP
A proud partner of the AmericanJobCenter network

FUNDING PERIOD: October 1, 2021 – September 30, 2022

CHICAGO COOK WORKFORCE PARTNERSHIP
69 W. WASHINGTON ST. SUITE 2860
CHICAGO, IL 60602

RESPONSES DUE:
Friday, July 30, 2021 by 4:00 PM CDT

Bidder Webinar: Tuesday, June 29, 2021, 10:30 – 12:30 PM (CDT)**

Webinar Registration https://attendee.gotowebinar.com/register/3150814811914900238

**Attendance is not mandatory, but respondents are highly encouraged to attend

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SECTION I. Purpose, Locations, Performance Period, Funding, and Schedule

A. Purpose

The Chicago Cook Workforce Partnership (The Partnership) and the Local Workforce Innovation Area #7 (LWIA 7) Workforce Innovation Board (WIB) are issuing this RFP to identify through competitive selection delegate agencies to provide workforce services for businesses and job seekers in accordance with Title I of the Workforce Innovation and Opportunity Act (WIOA or The Act). Specifically, The Partnership seeks to identify qualified respondents that can provide these services to Chicago and Cook County residents who face economic hardships and/or have been historically underserved. The Partnership seeks innovative service delivery proposals that meet the specifications outlined in this RFP and that are characterized by customer service, collaboration, integration, racial equity, accountability, continuous improvement, and outcomes.

The Partnership administers a comprehensive workforce development system featuring different program models with multiple entry points where job seekers and businesses can access the full range of WIOA services and benefits. The delegate agency program model features small to mid-sized organizations serving job seekers from a distinct geography and/or special population. They also serve business customers and develop employer relationships and job leads for the network's job seeker population. Delegate agencies must demonstrate a capacity to serve residents from the following communities and/or target populations.

Chicago Communities	Suburban Cook Municipalities
• Auburn Gresham	• Bellwood
• Austin	• Berwyn
• Bronzeville	• Blue Island
• Calumet Heights	• Calumet City
• Chatham	• Chicago Heights
• Garfield Park (East & West)	• Cicero
• Greater Englewood	• Country Club Hills
• Greater Grand Crossing	• Dixmoor
• Humboldt Park	• Dolton
• Little Village	• Harvey
• Marquette Park	• Lansing
• New City	• Maywood
• Near and Lower West Side	• Park Forest
• North Lawndale	• Phoenix
• Roseland	• Riverdale
• West Lawn	• South Holland
• Woodlawn	
• South Chicago	
• South Shore	

In addition to high poverty areas, The Partnership is prioritizing delegate agencies that serve individuals from the following populations:

- Returning residents (formerly incarcerated)
- Persons with disabling conditions
- Individuals who are experiencing homelessness
- Residents of public housing
- Persons with limited English proficiency

The Partnership will also continue to support a delegate agency to provide both WIOA Adult and Dislocated Worker services in our leased space located at **10325 South Halsted Street, Chicago, Illinois within the Washington Heights Community**. The Partnership will accept proposals to run a delegate agency center at this specific location.

Respondents proposing to serve residents from community areas/and or targeted populations not on this list must present a compelling case with research and data documenting a community/population need, as well as, a sound plan to address the need that includes collaborative relationships with resources in the community.

This RFP describes the specific services The Partnership seeks and sets forth application requirements for eligible delegate agency providers. The Partnership will evaluate all timely submitted proposals and competitively award contracts to Delegate Agencies whose submissions are most responsive to the need for services described herein.

B. Performance Period

The period of performance begins on October 1, 2021 and concludes on September 30, 2022. The Partnership reserves the right to renew grant agreements for up to four (4) additional one-year terms based on funding availability and the selected respondent's achievement of benchmarks, compliance with WIOA rules and regulations, and conformity with The Partnership's and the WIB's vision for the public workforce system.

C. Funding

The Partnership will award WIOA funds to entities that demonstrate an ability to effectively deliver and manage services as described herein. It is the expectation of The Partnership that respondents will become proficient in their understanding of the WIOA services and subsequent regulations. The Partnership will provide technical assistance and training on WIOA regulations and policies. All proposals must be comprehensive and address the full scope of services or demonstrate a relationship with other entities that together will deliver the breadth of services identified within this RFP. WIOA funding for this solicitation is categorized by two job seeking customer populations: Adults and Dislocated Workers. Currently, The Partnership funds 12 delegate agencies with Adult funds and 8 delegate agencies with Dislocated Worker funds. The grant awards range from the following:

WIOA Title I	PY 2020 Individual Delegate Award Range
Adult	$90,000-$217,000
Dislocated Worker	$100,000-$545,000

For Program Year (PY) 2021 agreements, The Partnership will set a minimum total (Adult plus Dislocated Worker) award of $300,000. The Partnership does not anticipate awarding more than the total amount listed below for these funding categories:

	Adult	Dislocated Worker
Total Funds Available	$2,000,000	$1,800,000

Supportive services such as funds for transportation, uniforms or certifications and participant training activities are allowable expenses ***but SHOULD NOT be included in the respondent's proposed WIOA budget****. Respondents must possess the capacity to successfully administer supportive service funds.* Additional funds received by The Partnership may be disbursed to expand existing programs or by consideration of proposals not initially funded under this RFP.

The successful respondents to this RFP will enter into a grant agreement with The Partnership and become part of The Partnership's service network. Agreements executed because of this RFP process will be paid through cost reimbursement unless otherwise specified. Final agreements will be subject to any changes in legislation, regulations, or policies promulgated by the federal or state funders. The Partnership reserves the right to vary or change the terms of any agreement executed in accordance with this RFP, including but not limited to funding levels, scope of services, performance standards, and contract terms, as it deems necessary.

D. Sunset and Closeout Consideration

The Partnership will work with current delegate agency providers that are not selected through this RFP for WIOA services in PY 2021 to transition services. Selected respondents may be required to serve eligible customers already registered into WIOA by an agency that is discontinuing services.

E. Tentative Schedule

Release of RFP …… June 21, 2021
Bidder Webinar …… June 29, 2021
Question Submittal Deadline ……..... July 12, 2021
Posting of Questions and Answers ……July 20, 2021
Proposal Submittal Deadline ……..……July 30, 2021
Proposal Review ……August 2021
Selection Review by Chicago Workforce Innovation Board ……September 2021
Anticipated Contract Commencement ……October 1, 2021

SECTION II. Background

A. Overview of The Partnership

Created in 2012, The Chicago Cook Workforce Partnership is an umbrella organization operating the public workforce system in the City of Chicago and Cook County. The Partnership combines federal, state, local and philanthropic resources to broaden the reach and impact of workforce development services for both employers and job seekers. The Partnership has programmatic and administrative responsibility for all WIOA services provided in Chicago and Cook County (Local Workforce Investment Area 7, hereinafter LWIA7).

The Chicago Cook Workforce Innovation Board (WIB), which oversees LWIA 7, has statutory responsibility for the local implementation of WIOA and provides a forum for business, labor, education, government, community-based organizations, and other stakeholders to collaboratively develop strategies that address the supply and demand challenges confronting the local workforce. The WIB, together with The Partnership, provides leadership, strategic planning, policy direction, and oversight for WIOA services in LWIA 7.

All efforts put forth by The Partnership are guided by the following vision, mission, and values:

Our Vision: Every person has the opportunity to build a career; every business has the talent to grow and compete in a global economy.

Our Mission: To create, promote, and effectively manage a network of workforce development organizations that:

- Designs innovative solutions to address business needs, and,
- Prepares individuals for, and connects them to, career opportunities.

Our Values:

- **Collaboration:** We strategically engage a variety of local, regional, state, and national partners in workforce and economic development to ensure program effectiveness. The breadth of these activities allows us to connect businesses and individuals to a wide array of resources.
- **Innovation:** We design and implement initiatives that result in dynamic outcomes for businesses and job seekers alike. We seek creative solutions to current and future workforce development challenges.
- **Transparency:** We clearly communicate our expectations, policies, and processes to stakeholders and partners. We openly and publicly share the results of our initiatives.
- **Financial Responsibility and Stewardship:** As stewards of public, private, and philanthropic funds, we ensure effective and efficient management of our resources to achieve the maximum returns on investment and greatest impact on the business or individual served.
- **Quality:** We commit to continuous improvement. We aspire to a standard of excellence that ensures the delivery of high caliber services for all stakeholders while identifying opportunities for further growth.
- **Dignity of Work:** We believe in the value of work and the mutually beneficial impact that it has on individuals and the companies that employ them. We support investment in human capital as a means of strengthening local communities and the regional economy.

Priorities:
The Partnership is committed to improving racial and gender equity in the workforce. We are committed to provide services that support communities and individuals who have been historically underrepresented in various industries due to systemic and structural racism, sexism, and other forms of discrimination. Our commitment includes ensuring the network of delegate agencies prioritizes serving communities of color that continue to experience higher rates of unemployment than predominantly White communities. The Chicagoland Workforce Funder Alliance Equity Working Group's definition of an equitable workforce as:

> *"one in which race, ethnicity, gender, and other demographic characteristics no longer predict one's outcomes in the labor market. All people have equitable access to jobs that are safe, pay a living wage, offer benefits, provide career pathways, and opportunities for mobility. The workforce—both public and private—is representative of the general population at all different levels of skill and pay across occupational groups and sectors. To close the gaps, near-term efforts should focus on communities most impacted by racial, ethnic, and gender disparities while working collaboratively to transform policies, institutions, and structures in the long term.[i]"*

The Partnership aligns its work with regional community and economic development initiatives including the City of Chicago's INVEST South/West initiative and Cook County's Comprehensive Economic Development Strategy. Both initiatives have an intentional focus on reducing inequities in areas that have historically experienced disinvestment in infrastructure, unjust housing policies, and a loss of jobs and economic opportunity. The 2020 Workforce Innovation and Opportunity Act Local Plan for LWIA 7

outlines the 10 neighborhoods of focus for INVEST South/West and the 34 suburban municipalities identified in Cook County's Comprehensive Economic Development Strategy on pages 53 through 55.

The Partnership encourages respondents to include innovative strategies for outreach and service provision to the communities of greatest need throughout the region especially those prioritized by both the City and County.

B. Overview of WIOA and the Service Delivery System

Signed into law on July 22, 2014 and funded by the U.S. Departments of Labor and Education, the Workforce Innovation and Opportunity Act supports workforce development programs throughout the nation in service of job seekers and businesses. WIOA helps job seekers access employment, education, training, and supportive services needed to succeed in the labor market, particularly those with barriers to employment. WIOA is also designed to help businesses find the skilled workers they need to compete in the global economy. The Department of Commerce and Economic Opportunity administers WIOA funding for the State of Illinois, and in turn delegates the implementation and administration of WIOA to local workforce boards and their administrative agencies. The U.S. Department of Labor envisions a WIOA One-Stop system that is quality focused, employer driven, customer centered, and tailored to meet the needs of regional economies. The local system strives to:

- Provide job seekers with the skills and credentials necessary to secure and advance in employment with family-sustaining wages.
- Provide access and opportunities to all job seekers, including individuals with barriers to employment such as individuals with disabilities, to prepare for, obtain, retain, and advance in high quality jobs and high demand careers.
- Enable businesses and employers to easily identify and hire skilled workers and access other supports, including education and training for their current workforce.

The Chicago Cook WIOA-funded Workforce Development System is comprised of five service delivery models:

- ***American Job Centers*** are high-capacity sites serving the general job-seeking population as well as businesses. Formerly known as "One-Stops" these sites must serve both Adult and Dislocated Workers (Youth optional) and must have active participation from the core WIOA partners.
- ***Delegate Agencies*** provide services to job seekers and businesses, differing from One-Stops in that they are smaller and may serve a smaller geographic area or special population.
- ***Youth Delegate Agencies*** provide services to assist youth ages 16-24 in achieving academic and employment success.
- ***Sector Centers*** are business service hubs concentrating on business and job seeker services related to a specific industry sector and are responsible for educating the other WIOA delegate agencies on the needs and demands of their given sector.
- ***Career Pathway Training Programs*** are often cohort-based, skills training programs that are demand driven within The Partnership's focus industry sectors and may also include bridge programs designed to serve individuals with basic skills deficiency and/or limited English proficiency.

This solicitation is for Delegate Agencies.

SECTION III. Eligible Respondents

Any governmental, not-for-profit, educational institution or for-profit entity properly operating in accordance with Federal, State, and local law, and in business for at least three years, may submit a proposal for consideration. Minority-owned and women-owned businesses are encouraged to apply.

Respondents must be eligible to do business with the City of Chicago, Cook County, and the State of Illinois.

Respondents may submit proposals in which subcontractors are identified to provide program components. Respondents may also identify organizations with which they will collaborate to enhance the project design. However, any proposal submissions from a collaboration of two or more entities should clearly provide the following information in the narrative portions of the proposal:

- Identify the lead agency for the collaborative partnership.
- State the roles and responsibilities of each collaborator.
- Include an organizational chart for each organization and for the collaborative.
- Describe how funds will flow within the collaborative.
- Identify the percentage of each partner's fiscal responsibility.
- Identify the qualified fiscal agent for the collaborative partnership.

Additionally, entities must satisfy the following criteria to be considered eligible respondents to this RFP:

1. Entities must operate in accordance with Federal, State, and local law.
2. Entities must be currently eligible to do business with the City of Chicago, Cook County, the State of Illinois, and The Partnership.
3. Entities must possess the technical competence, management expertise, professional staff capacity, administrative and fiscal capacity, and demonstrated fiduciary responsibility to accomplish the objectives and scope of work stated in this RFP.

Proposals from respondents who have had a previous Partnership contract terminated for inadequate performance, or for any WIOA proscribed action, within the previous 2 program years (July 1, 2019 to June 30, 2021) are **ineligible** to apply.

Entities are **ineligible** to respond to this RFP if they: 1) are currently barred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by a Federal, State, County or City department/agency, quasi-governmental agency (including but not limited to Chicago Housing Authority, City or Suburban community colleges, Chicago Public Schools et al.), or The Partnership; 2) have existing grants with any Federal, State, County or City agency that have been suspended or otherwise deemed not in good standing within the past two (2) years; or 3) are not in compliance with Illinois Department of Revenue, Federal Internal Revenue Service or Federal Office of Management and Budget requirements.

Awards made to entities subsequently found to have been ineligible may have funds clawed back at The Partnership's sole discretion.

SECTION IV. Delegate Agency Role and Responsibilities

A. Relationship with the Community

American Job Centers and the Sector Centers serve as 'hubs' within the Chicago-Cook workforce system while the Delegate Agencies are the "spokes" often providing smaller and more specialized services. This hub and spoke model relate to interactions with both WIOA job seekers and business customers, as well as WIOA mandated partners. The Partnership expects delegate agencies to provide outreach and points of entrance to geographic communities and/or populations of high need which may not be sufficiently served by the larger One-Stop "hub".

As the local community face of Chicago and Cook County's workforce services, delegate agencies must demonstrate knowledge of and relationships with their local community and/or within their target

population. Delegate agencies must make efforts to provide services throughout the community and ensure accessibility through a variety of means, including but not limited to the following:

Hours of Operation: Delegate agencies must be prepared to offer services at hours beyond the traditional Monday thru Friday 8:30 a.m. to 5 p.m. timeframe, unless precluded by external factors.

Recruiting and Community Outreach: The selected respondent must develop innovative recruitment strategies to ensure a steady pipeline of jobseekers coming to the center. Outreach activities must target community residents, businesses, faith groups, other WIOA service providers, mandated partners (Illinois Department of Employment Security, Illinois Department of Human Services-Office of Rehabilitation) and public offices of elected officials within the surrounding community, with particular focus on recruiting the proposed targeted population and those identified in the Local Plan, including returning residents, and people with disabilities. Effort must be made to promote and direct job seekers to orientations, workshops, resources, hiring events and other basic career services. Presentations to these groups should include, high growth industries and regional labor market trends, and local opportunities. Additionally, The Partnership may require the selected respondent to participate in community resource fairs, elected official events and/or special events during the year.

Orientations: Selected Respondents are expected to conduct orientations to the public that explain the full array of services available through the delegate agency.

Language Capacity: Selected Respondents must have staff who are proficient in the foreign language (s) spoken within the proposed targeted community and must be knowledgeable of the community culture.

B. Relationship with Workforce System

Delegate Agencies must take lead roles in coordinating services for Cook County job seekers and businesses within their community and/or special population. Such services include the following:

Special Projects: Delegate agencies must act as fast responders or facilitators in staffing special outreach and recruitment events for their targeted community. These may include job fairs, service fairs, large scale hiring events, hosting tables at conferences or other public events, and participating in other City and County-sponsored projects and activities.

Coordinate System-wide Job Recruitment: The selected respondents are expected to collaborate with community partners and share job leads, coordinate resume collection, screening, and refer to employer. This sharing of job leads is done with the goal of making the best possible fit between job opening and job candidate. This must be done without preference for the agency's own candidates and/or WIOA enrollment status. All employer contact information and their job orders must be posted on the Career Connect job portal system. Delegate agencies must also search their customer pool (enrolled participants and non-enrolled customers) for qualified candidates for any system wide recruitment efforts. Recruitment of job candidates to businesses is a basic career services and not limited to WIOA enrolled customers.

Collaborative Partnership: Selected respondents must actively participate in work teams organized by The Partnership and/or Sector Centers. These teams are designed to provide coordinated responses to community demand, improve service integration, and improve overall services to businesses and job seekers. Delegate representatives must attend and participate in Contractor Meetings, Regional Meetings and Business Service Team meetings.

Community Linkages and Collaborations: The selected respondents must build relationships with valuable partners, including faith-based organizations, grantees from other government programs such as Community Development Block Grants and other community-based organizations.

Rapid Response Events: Delegate agencies serving Dislocated Workers may also be required to provide staffing and support to "Rapid Response" activities at businesses experiencing dislocation events (layoffs or reductions of work force) in conjunction with The Partnership and State partners. These activities include staffing outreach events on-site at businesses experiencing layoffs (or at alternate sites as necessary) and providing subsequent services to jobseekers affected by these dislocation events.

C. Job Seeker Service Delivery:

1. Basic Career Services

Under WIOA, the Department of Labor classifies Career Services into two categories: Basic Career Services and Individualized Career Services.

All City/County residents are eligible to take advantage of WIOA Basic Career Services which assist jobseekers in finding gainful employment, and orienting customers to WIOA services and procedures, as well as, provide information on the labor market and unemployment insurance. These services may be provided by one or a combination of staff from the mandated partners. WIOA Basic Career Services must be made available to all individuals seeking services through the entire workforce delivery system and include the following as stated in the Act:

- Outreach, intake (including worker profiling), and orientation to information and other services available through the entire workforce delivery system.
- Determination of whether the individual can receive assistance from the adult or dislocated worker programs.
- Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skill gaps) and supportive service needs.
- Labor exchange services through Illinois Job Link
- Job search and placement assistance; and individual career counseling as needed, including:
    - Provision of information on in demand sectors and occupations
    - Provision of information on non-traditional employment
- Appropriate recruitment and other business services on behalf of employers including information and referrals to specialized business services other than those traditionally offered through the entire workforce delivery system; including but not limited to On-the Job Training, Customized Training, and Incumbent Worker Training.
- Provision of referrals to and coordination of activities with other programs and services including programs and services within the American Job Center network and when appropriate, other mandated partners, workforce development or human services programs.
- Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local regional and national labor market areas including:
    - Job vacancy listings in labor market areas;
    - Information on job skills necessary to obtain vacant jobs listed; and
    - Information related to local in demand occupations and earnings, skill requirements and opportunities for advancement.
- Provision of information on eligible training providers, performance information and program cost.
- Provision of information relating to the availability of supportive services or assistance and appropriate referrals to those services including but not limited to; transportation, childcare, child support; medical or child health referrals available through the State, information regarding how to apply for SNAP and/or TANF benefits and earned income tax credits.

- Assistance in establishing eligibility for programs of financial aid assistance for training and or education programs not provided under WIOA.
- Provision of information regarding filing claims under UI programs, including meaningful assistance to individuals seeking to file a claim. "Meaningful assistance" means:
  - Providing assistance on-site using staff who are trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
  - Providing assistance by phone or technology as long as the assistance is provided by trained and available staff and within a reasonable time frame.

In addition to the foregoing, The Partnership requires the following:

Resource Room/Area: Delegate Agencies must maintain a publicly accessible resource area (including access for disabled persons) as part of their WIOA services. This public space must include computers with high-speed internet access, printers, copy paper, job postings, information on Unemployment Insurance eligibility, services, and financial aid for local non-WIOA training, labor market reports, educational programs, and information on partner programs. The resource area must have staff available to answer questions and to assist customers with job search needs. Individuals may receive self-service or informational activities without an eligibility determination, an appointment may be necessary due to capacity limitations.

Workshops: The selected respondents must provide a wide range of informational workshops to job seekers as part of its career services offerings. These workshops focus on job search and readiness skills, such as: interviewing techniques, resume preparation, effective networking techniques, effective communications skills, conflict resolution, financial and computer literacy, workforce trends, high demand industries, labor market information, workers' rights in the workplace (https://cjc.net/frontline-focus/tools-frontline-staff/), and navigating virtual hiring events.

Service Coordination with The Partnership's Non WIOA Programs: Selected respondents are expected to support job seekers and special events associated with The Partnerships non-WIOA grants and programs such as, but not limited to:

- AARP FOUNDATION BACK TO WORK 50+: The Back to Work 50+ Program is for unemployed and underemployed people aged 50 and up who want to gain confidence, skills, and explore opportunities needed to successfully compete in today's job market. Provides individualized career counseling, job coaching, and skills development.
- CHICAGO HOUSING AUTHORITY - RESIDENT EMPLOYEE SERVICES: Career services for Chicago Housing Authority residents and voucher holders that include coaching, digital literacy, training, and support in navigating federal workforce program options.
- CONSTRUCTIONWORKS POWERED BY ILLINOIS TOLLWAY: Construction initiatives include recruiting, training, and placement opportunities for populations that are underrepresented in Illinois' high-demand skilled trades occupations.

Eligibility Determination and Registration: The eligibility determination process is considered a Basic Career Service but is explained in detail in this section as it is a critical function of the delegate agency provider. The selected respondents are required to develop and implement a WIOA eligibility process (in person and virtually) that is timely and in accordance with State and Partnership policy requirements without unnecessary delays in providing access to career services. Included in this process, Delegate agencies must determine WIOA eligibility and collect information to support the determination of eligibility. All customer enrollment documentation must be collected, entered, and uploaded into The Partnership's Career Connect system. **Customers receiving individualized career services must be eligible and registered into WIOA**.

WIOA funding serves two (2) distinct job seeker groups with different eligibility. To be an eligible **Adult,** an individual must be 18 years of age or older and provide proof of Social Security number, compliance with Selective Services requirements, and compliance with Selective Service requirements, and authorization to work within the United States. WIOA prioritizes services to adult recipients of public assistance, individuals who are basic skills deficient, veterans and/or other low-income individuals.

The current low-income levels are:

70% of the Lower Living Standard Income Level	
Family Size	**Income Level**
1	$12,880
2	$17,420
3	$22,962
4	$28,349
5	$33,457
6	$39,130

To be an eligible **Dislocated Worker**, an individual must have been terminated or laid off, or have received a notice of termination or layoff, from employment; have been self- employed but be unemployed as a result of general economic conditions; or be a displaced homemaker.

Selected respondents must become knowledgeable of WIOA eligibility requirements. Please see the linked policy letters for more information. Adult: Dislocated Worker: Veterans

Enrollment for both Adult and Dislocated Worker services is determined by an assessment of the applicant's skill level, education, aptitudes, abilities, work and wage history, supportive service needs, as well as their interests, goals. If a customer is deemed inappropriate for WIOA services, he or she **must be referred** to the appropriate educational entity or social service agency, or mandated partner for assistance.

Hiring Events: Selected respondents are expected to refer candidates to hiring events organized by The Partnership, the American Job Center and/or the Sector Centers, and those hosted by stakeholders such as elected officials and core partners. Delegate agencies are encouraged to hold hiring events for their own customers and targeted communities.

2. Individualized Career Services

Under WIOA, Individualized Career Services must be made available, if determined to be appropriate, to assist an individual with obtaining or retaining employment. Individualized Career Services are more comprehensive, in-depth than Basic Career Services, and involves interaction with a career coach or an equivalent. The role of the career coach is to ensure access to the full array of services and activities required and available under WIOA, and to provide professional support to jobseekers as they develop an Individual Employment Plan (IEP) and seek to improve job readiness skills.

These services include the following:

- Completion of objective, comprehensive and specialized assessments of the Adult and Dislocated Worker customer. These assessments are individualized and are conducted or coordinated by a career coach or equivalent. Required Assessments include Basic Skills Screening Tool, Objective Assessment, and Work/Academic History. Assessment tools and processes may be modified by The Partnership.

- Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers. Diagnostic testing and use of other assessment tools; include but are not limited to TABE 11/12, CASAS Goals, Objective Assessment to identify employment barriers, Career Interest Inventories, Illinois WorkNet Skills & Inventories, etc.,
- Career Exploration must include completion of an Interest Inventory, the identification of occupations in line with career goals, using job descriptions to identify skill gaps, use of Target Occupational Profiles.
- Development of an Individual Employment Plan (IEP) is used to formulate employment goals, appropriate achievement objectives and the appropriate combination of services for the participant to achieve his or her employment goals. One key role of the career coach is working with the customer to develop the IEP. The IEP should be considered an agreement between the career coach and the customer, of the plan of action needed to overcome barriers to employment and secure employment leading to self-sufficiency. The IEP should include short- and long-term goals and the steps and supports necessary to achieve those goals. Ideally, the IEP will focus on a career pathway that can provide a guide beyond initial employment and must be updated regularly as a customer progresses, or as needs arise. All WIOA services provided to a customer must be identified, and the need justified, in the IEP. A hard copy case file must be maintained on each participant containing eligibility documents and pertinent case file information not recorded in the electronic case file. Customers are also to be provided with a signed copy of the IEP. The IEP is a living plan that should be updated as goals and milestones are met and routinely discussed with jobseeker.
- Provision and coordination of Supportive Services**:** Supportive Services address those life issues impacting the jobseeker's ability to get or retain adequate employment. Depending on funding availability, The Partnership may award funds to assist with basic supportive services including but not limited to, transportation, work equipment, uniforms, and childcare services. In cases where customers must be referred to services not provided by the Delegate Agency, all referrals of WIOA customers should be tracked to ensure that the customer is receiving the service. If the service cannot be provided per that referral, it is the expectation that alternate plans for securing that service will be initiated.
- Group coaching.
- Individual coaching.
- Career planning.
- Short term pre-vocational services including the development of learning skills, communications skills, interview skills, punctuality, workplace readiness skills, for unsubsidized employment or training.
- Internships and work experiences that are linked to careers.
- Financial literacy services; (such as financial aid applications, income tax credits and counseling)
- Out of area job search assistance and relocation assistance; and
- English Language acquisition and integrated education and training programs.

3. Training Services: (included in Individualized Career Services)

Training may be made available to individuals if after an interview, assessment or evaluation, and career planning it is determined that the individual:

- Is unlikely or unable to obtain or retain employment that leads to self-sufficiency or comparable wages to or higher than wages from previous employment.
- In need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher wages from previous employment through career services alone; and
- Has the skills and qualifications to successfully participate in the selected program of training services.

WIOA places a strong emphasis on Career Pathways. Delegate agencies should apply this approach throughout their service delivery continuum. Career Pathways are defined as, a combination of rigorous and high-quality education, training, and other services that:

- Align with the skill needs of industries in the state or regional economy.
- Prepare an individual to be successful in any of a full range of secondary or postsecondary education options.
- Include counseling to support an individual in achieving the individual's education and career goals.
- Include, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.
- Organize education, training, and other services to meet needs of an individual in a manner that accelerates the educational and career advancement.
- Enable an individual to attain secondary school diploma or its recognized equivalent, and at least one recognized postsecondary credential; and
- Help an individual enter or advance within a specific occupation or occupational cluster.

The following items explain the different training options available to the jobseeker. The selection of training services should be conducted in a manner that maximizes customer choice and is linked to in-demand occupations. Career Coaches must ensure that job seekers explore other funding options and research performance of relevant training providers.

Individual Training Accounts (ITAs): ITAs are tuition vouchers to be redeemed at one of the many eligible training providers. Training services are not usually provided directly by the delegate agency but, rather, the delegate agency facilitates the ITA application and selection process with the jobseeker. The training is conducted by an approved training provider listed on the Illinois Workforce Development System (IWDS) certified training provider list. Delegate agency career coaches are expected to assist job seekers with researching and selecting training programs that align with the job seeker's IEP.

The Partnership has contracted with a third-party entity, referred to as the Training Assessment and Referral Agency (or TARA) to process Individual Training Accounts. The TARA analyzes patterns and trends and provides a system of checks and balances to ensure participants receive equitable services and to minimize conflicts of interest among grant recipients. **Respondents SHOULD NOT identify ITA dollars in their proposed budget.**

Internships/Work Experience: Work experience is a planned, structured learning experience that takes place in a work environment for a limited period. This may be paid or unpaid, as appropriate, and may take place in the private, non-profit, or public sectors. Fair Labor standards apply in any work experience where an employee/employer relationship exists, as defined by the Fair Labor Standards Act or applicable State law.

Pre-Apprentice Training: Pre-apprenticeship programs provide training to increase math, literacy, and other vocational skills needed to enter a registered apprenticeship program. A pre-apprenticeship program funded with an ITA must have at least one registered partner; and must demonstrate or develop a strong record of enrolling its graduates into a registered apprenticeship program.

On-the-Job Training: OJT services involve "hands on" training in occupational skills for a specific role. Training is provided by a private, nonprofit, or public sector employer for an individual who needs additional skill training for a specific job. The trainee participant is an employee of the company. To offset the cost of training, the employer can be reimbursed up to 50% of wages, during the training period. Delegate Agencies may also develop OJT agreements with employers and are required to ensure that staff are knowledgeable of the OJT forms and procedures. **Respondents SHOULD NOT identify OJT dollars in their proposed budget.**

Customized Training: Customized Training is industry and occupation specific skills training delivered through a curriculum designed collaboratively by a delegate agency, any partners, and an identified employer(s). Customized training is intended to provide job seekers with specific skill sets identified as necessary for an industry, occupation, or position within a company. The employer must pay for a significant share of the cost of the training. All Customized Training agreements must be approved by The Partnership prior to implementation. **Respondents SHOULD NOT identify OJT dollars in their proposed budget.**

4. Job Placement:
The selected respondent is expected to assist qualified jobseekers to refer to employment opportunities with the ultimate goal of obtaining unsubsidized employment. Each delegate agency will have a target goal for the number of persons placed into competitive employment within each title. A delegate agency will receive full "credit" for placing a WIOA participant who was enrolled by a different agency into employment. All placements and placement related activities must be recorded into the Career Connect system.

5. Follow-up Services:
Delegate agencies must communicate with, and monitor the progress of, customers throughout their participation in WIOA. Upon placement follow-up activities such as career coaching calls must be provided as appropriate, to individuals who have exited from the program for up to one year. Follow-up services tend to be of two major types: retention and advancement services for employed customers; and reemployment services for customers who lose their jobs.

D. Employer Service Delivery
The WIOA legislation is premised upon the dual customer approach and expressly requires that services be provided to both job seekers and employers. Business Services are a critical component of WIOA service delivery, providing direct value to employers, employer associations or other such organizations. Each delegate agency must employ Business Service Representatives to provide the services detailed below to the employer customer. Business Service Representatives must participate in system wide Business Service Team meetings facilitated by The Partnership. As part of employer services, Delegate Agencies are expected to provide the following:

Customized Recruiting and Screening Services
Customized business services may be provided to employers, employer associations, or other such organizations. These services are tailored for specific employers and may include:

- Advertise Job Openings: Provide employers with the opportunity to post employment opportunities throughout the Workforce system. Title I staff must post job orders through the Career Connect job order portal.
- Provide Access to Space: Provide or secure space for businesses to interview candidates, hold recruiting events, conduct informational meetings, etc.
- Participate in Hiring Events: Offer multiple employers the opportunity to meet WIOA enrolled and non-enrolled job seekers. Hiring Events may be in person or through a virtual platform. The Partnership may assign delegate agencies to participate in The Partnership-led job fairs and or hiring activities.
- Customized Screening of Applicants*:* Thoroughly screen job seekers (based on employer skill requirements) and prepare them for interviews, saving businesses time and increasing the likelihood that business will return for more candidates in the future.
- Customized Recruitments*:* Provide employers with an in-person opportunity to inform job seekers (screened and/or unscreened) about available job openings within their organization, including targeted hiring events.

Delegate agencies must have timely and focused response to recruiting events requested by The Partnership's Business Relations and Economic Development unit (BRED) Sector Centers or other Partnership sponsored initiatives. Delegate agencies must have a point person designated to alert their case management staff of opportunities and to follow-up with the referring entity on those screened candidates who meet the referral criteria. Each referred candidate must have a professionally prepared resume.

Information and Technical Assistance

- Provide Workforce Education**:** Educate businesses about services available through The Partnership's network of agencies, and how to access these services. This includes providing businesses in relevant industries with information from and linkages to services at the Sector Centers.
- Advise on Workforce Issues**:** Providing informational services to businesses on a variety of workforce topics, including workforce-related and economic development tax incentives; unemployment insurance; labor market statistics; and other workforce-related information identified as providing value to businesses.
- Assisting employers with accessing Local, State, and Federal tax credits, work with employers making layoffs, and with employees being laid-off, to create re-employment plans.
- Provide Human Resource Consultation: Such as the following:
    - Creating orientation sessions for new workers.
    - Honing job interview techniques for efficiency and compliance.
    - Analyzing employee turnover.
    - Creating job accommodations and using assistive technologies; or
    - Explaining labor and employment laws to help employers comply with discrimination, wage/hour, and safety/health regulations.

SECTION V. Performance, Deliverables and Reporting

A. WIOA Performance

WIOA established a comprehensive performance accountability system to optimize the return on investment of federal funds and to assess the effectiveness of local areas.

The Partnership negotiates new WIOA performance benchmarks with the Illinois Department of Commerce and Economic Opportunity (IL-DCEO) each year. Each delegate agency will be held to the performance measures below. Please note the meeting range of each measure is 90% of the goal.

WIOA Performance Measure	Definition	Adult Goal	Dislocated Worker Goal
2nd Qtr. Employment	The percentage of participants who are in unsubsidized employment during the second quarter after exit.	73%	81%
4th Qtr. Employment	The percentage of participants who are in unsubsidized employment in the fourth quarter after exit.	71%	80%
Median Earnings	The median earnings of participants who are in the second quarter after exit.	$6500	$10,000
Credentials	The percentage of participants who obtain a recognized post-secondary credential or secondary school diploma/GED within 1 year after exit from the program.	73%	70%
Skills Gains	The percentage of participants enrolled in a training or education program who show documented skills gains during a program year.	47%	44%

As required under WIOA, the U.S. Department of Labor has established a sixth primary performance indicator: "Effectiveness in Serving Employers". IL-DCEO has chosen to use the following two performance measures to gather data that will permanently establish this indicator:

WIOA Performance Measure	Definition	Goal
Employer Penetration Rate	The percentage of employers using services out of all employers in the local workforce area.	TBD
Retention with Same Employer	See 2nd Qtr. and 4th Qtr. Employment outcomes above.	TBD

B. Deliverables

Because many of the WIOA performance measures are based on exits from the program, The Partnership developed other key point in time benchmarks that will provide the most accurate picture possible of how agencies are attaining The Partnership's workforce goals. Selected respondents will enter into a "loading plan with The Partnership that will outline at minimum the following benchmarks:

- Number of enrollments
- Number of enrollments residing in the targeted community or within the targeted population
- Number of total served
- Number of active cases per month (capacity/utilization)
- Number of individuals receiving ITAs
- Number or credentials earned
- Number of individuals placed
- Number of businesses served
- Number of job orders posted/filled
- Customer satisfaction rates (job seekers/businesses)

The Partnership reserves the right to set and change benchmarks, add new benchmarks and adjust rates based on final WIOA regulations and negotiated performance.

Selected delegate agencies will be continually evaluated based on their achievement of all DOL measures and The Partnership benchmarks. Grant agreement renewals will be largely based on achievement of benchmarks. The Partnership reserves the right to impose additional conditions and/or restrictions on the grant award, implement probationary periods, undertake any other corrective action, reduce funding, or end grant agreements based on poor performance on any of the benchmarks.

C. Data and Customer Tracking Systems

All participant data will be tracked on The Partnership's customer tracking system, Career Connect, which automatically links to the State of Illinois tracking system, IWDS. All selected respondents will be required to attend Career Connect training and will be required to utilize the system for all customer and business services provision. All service activity and case notes must be entered within the system properly, timely, and in a professional manner that documents and justifies the services provided, and progress of the participant. In addition to reporting and tracking customers through Career Connect, selected providers must submit monthly reports that document outcomes on agreed upon key benchmarks.

D. File Records, Retention and Ownership

Selected respondents must maintain and secure accurate file for every enrolled participant in compliance with Federal and State WIOA requirements and, where applicable, The Partnership's retention policies. Based on funding stream, participant files must contain a variety of documentation that includes most, if not all, of the following:

- Documents that support program eligibility/determination of need
- Documents that support the achievement of outcomes
- Intake and application form
- Intake assessment results
- Individual career plan and or Individual Employment Plan (IEP)
- Time and attendance sheets (training activities)
- Work site location and information
- Regular updates or case notes are stored electronically (minimally every 30 days)

Selected respondents must allow The Partnership and its regulatory partners including local, state, and federal representatives, unfettered and immediate access to all program records, materials, staff, and participants. In addition, respondents are required to maintain all files and records for four (4) years from the last day of the program year. For more information: Document Destruction Procedure

E. Oversight, Evaluation and Planning

The Partnership will monitor and evaluate selected respondents to determine if employers and job seekers are receiving the most comprehensive, streamlined set of services. The Partnership will also evaluate the quality and effectiveness of the service strategies developed for the participants, and the quality of the case management provided by the career coaches. Selected respondents must ensure program compliance and evaluate the quality and effectiveness of the service strategies. The Partnership's funders, including the U.S. Department of Labor, Illinois Department of Commerce and/or others, may conduct periodic external monitoring and evaluation of sub-grantees awarded pursuant to this RFP.

F. Accessibility and Equal Opportunity

The Partnership is committed to equal access for all participants to all services. All respondents must ensure equal opportunity to all individuals. No individual shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any program managed by The Partnership (including Workforce Innovation and Opportunity Act programs or activities) because of race, color, religion, sex, national origin, age, sexual orientation, marital status, medical condition(s), disability, English proficiency, veteran status, or political affiliation or belief. All respondents are expected to demonstrate full

compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws. This involves ensuring that staff receive accessibility training and may involve developing accessibility plans for both physical and substantive program access.

The selected respondent will maintain a culture of inclusiveness in compliance with Section 188 of WIOA 29 CRF 38, the Americans with Disabilities Act Amendments Act of 2008 (ADAAA), and all other applicable statutory and regulatory requirements. The selected respondent shall not unlawfully discriminate, harass or allow harassment against any employee, or applicant for employment or services due to gender, race, color, ancestry, religion, national origin, veteran status, physical disability, mental disability, medical condition(s), age, sexual orientation or marital status. Providers will assure compliance with the Americans with Disabilities Act of 1990 and its amendments, which prohibits discrimination on the basis of disability, as well as other applicable regulations and guidelines issued pursuant to the Americans with Disabilities Act Amendment Act. Additionally, partners agree to fully comply with the provisions of WIOA Title I, Section 504 of the Rehabilitation Act of 1973, Title VII of the Civil Rights act of 1964, the Age Discrimination Act of 1975, and Title IX of the Education Amendments of 1972, WIOA Title IB, 29 CRF Part 38 and all other regulations implementing the aforementioned laws.

Additionally, the physical characteristics of the facilities, both indoor and outdoor, will meet compliance with 29 CFR Part 38, or most recent ADAAA standards for Accessible Design and the Uniform Federal Accessibility Standards by or before July 1, 2020. In some cases, the facilities are leased by neither The Partnership nor its service providers (e.g., IDES CMS or the City of Chicago). In this case, LWIA 7 is in active, urgent, and ongoing negotiations with the parties to continue ADAAA compliance.

Services must be available in a convenient, high traffic and accessible locations considering reasonable distances from public transportation and adequate parking (including parking clearly marked for individuals with disabilities). Indoor space will be designed in an “equal and meaningful” manner providing access for individuals with disabilities.

SECTION VI. Solicitation, Process and Terms

A. Period of Solicitation

The deadline to submit a response to this RFP is Friday, July 30, 2021 no later than 4:00 p.m. (CDT). Submit your proposal electronically to DelegateRFP@chicookworks.org

B. RFP Inquiries, Questions and Answers

The primary mode of communication between The Partnership and potential respondents will occur via www.chicookworks.org. All questions pertaining to the RFP must be received in writing via email at RFPquestions@chicookworks.org by 4:00 pm (CDT) Tuesday, July 12, 2021.

The Partnership anticipates posting answers to all questions by Tuesday, July 20, 2021. A Question-and-Answer page will be posted on The Partnership website www.chicookworks.org. It is the respondent’s responsibility to check the website page frequently to stay apprised throughout the process. Only those questions directed to the above email will be answered. Questions will not be answered over the phone or in person. **Questions received after July 12, 2021 will not receive a response.**

C. Bidders Webinar

The Partnership will host a Bidders Webinar for all prospective respondents to this RFP. At this session, The Partnership staff will review program information, key proposal requirements, contract terms and conditions and respond to questions. Attendance is highly recommended. Other than during the Bidders Conference, **staff members are unable to provide technical assistance during the application process.** Please do NOT contact staff directly with any questions. All questions should be directed to RFPquestions@chicookworks.org.

The Information Session will be held:

Tuesday, June 29, 2021
10:30 a.m. to 12:30 p.m.

Please register **in advance** at: https://attendee.gotowebinar.com/register/3150814811914900238

After registering, you will receive a confirmation email containing information about joining the webinar.

A brief period will be reserved at the Bidders Conference for additional questions to be submitted in writing. Every effort will be made at the conference to answer questions submitted that day; however, all questions will be answered and posted on the website. No answers are final until posted on the website.

D. Limitations
The Partnership shall not pay for any costs incurred by the applicant agencies in the completion of this RFP. Submission of an RFP does not, in any way, obligate The Partnership to award a contract. The Partnership reserves the right to accept or reject any applications, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP, if it is in the best interest of The Partnership to do so. The Partnership may require successful applicants to participate in contract negotiations prior to contract finalization. The Partnership shall reserve the right to terminate, with or without cause, any contract entered as a result of this RFP process.

E. Disclaimers
All contract awards by The Partnership, pursuant to this RFP, are contingent upon the availability of funds. Respondents are liable for any and all costs incurred prior to final authorization by the WIB and the execution of a contract with The Partnership.

The Partnership reserves the right to:

- Rescind an award and/or reallocate the funding to another applicant should the successful respondent fail to execute its grant agreement in a timely fashion.
- Increase funding levels for any or all delegate agencies selected pursuant to this RFP, if additional funds become available, based on delegate agency performance, effectiveness, and other details.
- Change and amend as necessary its policies or procedures governing the delivery or scope of services described herein.
- Perform an assessment of the risk that any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event might have on an organization's ability to operate a proposed program.

F. Notice of Award
All respondents receiving an award will be notified in writing and by posting on the Partnership's website. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to this effect to The Partnership's Chief Administrative Officer/General Counsel at Illona.Sheffey-Rawlings@chicookworks.org. Only individual scores will be provided if requested; further technical assistance is not available at this time. Respondents that are not awarded a contract are encouraged to re-apply in subsequent funding cycles.

G. Disallowed Costs and Cancellations
Successful respondents must accept liability for all aspects of any Workforce Innovation and Opportunity Act program conducted under contract with The Partnership. Successful respondents will be liable for any disallowed costs or illegal expenditures of funds or program operations conducted. The Partnership

reserves the right to cancel an award immediately if new state or federal regulations or policy makes it necessary to change the program purpose or content substantially, or to prohibit such a program.

H. Sub-grantee Award Process

The sub-grantee award will not be final until The Partnership and the respondent have executed a mutually satisfactory sub-grant agreement. The Partnership reserves the right to make an award without further discussion of the proposal submitted. No program activity may begin prior to the WIB approval of the award and execution of an award letter and/or sub-grant agreement between the successful respondent and The Partnership. Reductions in the funding level of any sub-grant resulting from this solicitation process may be considered during the sub-grant agreement period when a respondent fails to meet expenditure, participant, and/or outcome goals specified in the sub-grant agreement or when anticipated funding is not forthcoming from federal or state governments or private donors. The Partnership reserves the right to determine both the number and the funding levels of sub-grantee agreements finally awarded. Such determination will depend upon overall fund availability and other factors arising during the proposal review process.

I. Cost and Negotiations

The Partnership reserves the right to reject any or all proposals received and to negotiate with any and all offers on modifications to proposals. Proposals submitted which are over the maximum amount of funds specified for this RFP will be rejected. The proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged any other individual for the same services performed by the respondent.

J. Modification of Sub-Grant Agreements

Any sub-grant agreements awarded pursuant to this RFP may be unilaterally modified by The Partnership upon written notice to the contractor under the following circumstances:

- Sub-grantee fails to meet performance and service expectations set forth in the contract, or
- The federal or state government increases, reduces or withdraws funds allocated to The Partnership, which impact services solicited under this RFP, or
- There is a change in federal or state legislation and/or their regulations, local laws, or applicable policies and procedures.
- If The Partnership receives additional public or private funds.

SECTION VII. Proposal Review and Evaluation Process

Applications will be evaluated by a team of reviewers, which may include WIB members, outside experts and Partnership staff. An entity's failure to submit a complete proposal, or to respond in whole or in part to RFP requirements, may cause The Partnership to deem the proposal non-responsive and thus ineligible for review.

A. Evaluation Process

Fiscal Review: The Partnership will also conduct a fiscal review of all qualified proposals including, budgets, agency audits, leveraged funds and responses to questions related to fiscal operations. The Partnership reserves the right to review and request further information regarding the respondent's financial situation, if not sufficiently outlined in the submitted. The Partnership reserves the right to assess the risk posed by any recent, current or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event that might affect an organization's ability to operate the requested program.

Program Narrative Review: Members of the review team will conduct an in-depth assessment of the program narrative section for each proposal. A scoring instrument will be used based on the evaluation criteria listed in the RFP.

Past Performance Review: Through this process, The Partnership will review a respondent's performance on any previous and/or existing Partnership grant agreement(s), as well as check references submitted from other grantors. Achievement of grant agreement outcomes (i.e., number of enrollments, job placements and retention of enrollees), along with compliance with programmatic and fiscal guidelines and timelines will be evaluated.

The review team will perform an in-depth evaluation of all responsive proposals based upon the criteria herein. Prior to its final funding decision, The Partnership may also: 1) meet with representatives of the responding entity to discuss the proposed program and budget; 2) identify and/or negotiate program or budget changes the responding entity must make as a condition of funding; and 3) identify other documentation the entity must provide as a condition of funding.

After analyzing all the above data, including the geographic distribution of the programs to ensure community access for Cook County residents as well as coverage of special populations, The Partnership will select respondents for recommendation to the Service Delivery Committee of the WIB and full WIB for approval. Once approved by the WIB, The Partnership may enter into grant agreements with successful respondents.

Entities that fail to meet the evaluation criteria specified herein, or proposals that do not meet the service needs will not receive further consideration for funding. Failure to meet evaluation criteria can include, but is not limited to, non-responsive language in the submission, failure to clearly address all areas in the project narrative as required, lack of required documentation, lack of financial capacity, and proposing programs, which do not address the specific needs of the population(s) being targeted.

B. Evaluation Criteria

Proposals evaluated with a score below 70 (out of a possible 100 points) will not be considered. Proposals that do not conform to submission requirements will be considered non-responsive. The Partnership reserves the right to contract with any respondent that falls within the acceptable point range and is not required to contract with the entity receiving the highest score as a result of the proposal review process.

All proposals will be scored according to the evaluation criteria set forth below and ranked from highest to lowest score. A recommended funding level will be determined based on several factors including overall ranking of proposal rating scores, the availability of funds, the number of applications submitted, reasonable unit cost as determined by The Partnership, sectoral need for the proposed services, and past performance.

Criteria	Point Value
Organizational Structure and Capacity for Serving Community/ Target Population	**25**
Program Narrative-Job Seeker Services	**20**
Program Narrative -Business Services	**15**
Past Performance and Planned Outcomes	**15**
Financial Structure and Fiscal Plan	**25**
Total Points Available	**100**

SECTION VIII. Proposal Questions and Required Attachments

A. All Required Submittal Documents

Respondents must submit all the following documents (as applicable) for **each proposal**. Respondents may submit for more than one location. Proposals containing all the following documents will be considered complete and eligible for review:

Program Proposal

1. Delegate Agency Organizational Leadership Survey (formsite.com)
2. Delegate Agency Title I Provider Checklist*
3. Respondent Information Form*
4. MOUs as applicable if submitting as a partnership or collaborative
5. Executive Summary (signed by the authorized representative)
6. Program Narrative (Response to Program Questions 1-32)
7. Staff Resumes and/or Job Descriptions
8. Grant Summary Form*
9. Reference Form*
10. Planned Participant Outcome Form*

Fiscal Proposal

11. Fiscal Narrative (Response to Fiscal Questions 1-14)
12. Fiscal Questionnaire*
13. Completed W-9 Request for Taxpayer Identification Number and Certification
14. IRS 501(c)(3) Tax Exempt Determination Letter dated within past 3 years (required only if applicable)
15. Certificate of Good Standing
16. Most Recent Audited Financial Statements
17. List of Board Members including year organization legally established
18. Cost Allocation Plan
19. Indirect Cost Rate Determination Letter (required only if applicable)
20. Segregation of Duties Form*
21. Budget Summary Forms for all applicable funding sources (Adult, Dislocated Worker,
22. Budget Narrative Form*

*Required forms can be downloaded with this RFP from The Partnership's website at https://chicookworks.org/our-network/request-for-proposals/ Other attachments listed above are described in the narrative questions in below. Forms and attachments do not count toward page limits for narrative responses.

All components of the Fiscal Proposal, except for the Budget and Budget Narrative, must be submitted by each partner entity if the respondent is a consortium.

Completed RFP responses must be submitted electronically to DelegateRFP@chicookworks.org by Friday, July 30, 2021 at 4:00 p.m. CDT. PROPOSALS RECEIVED AFTER THIS DATE AND TIME ARE LATE AND WILL NOT BE ACCEPTED.

B. Proposal Questions

Please provide narrative responses to the questions below to demonstrate your organization's programmatic, technical, administrative, and fiscal capacity for performing the duties outlined in this RFP. Delegate Agency Organizational Leadership Survey (formsite.com)

For each proposal submitted please complete the electronic organizational survey using the link above.

Executive Summary (2 pages maximum)
The Executive Summary must be submitted on the organization's letterhead and must provide:

1. An overview of the organization's qualifications, including the number of years it has successfully provided services within the targeted communities and/or with the priority population.
2. If submitting as a formal partnership or collaboration, please identify all key partners and the lead entity.
3. A concise description of the proposed program including proposed number of customers to be served.
4. The specific location of the delegate agency, the targeting community and/or population and the amount of WIOA funding requested per funding stream.

Program Narrative Questions (30-page maximum)
Please identify the question number and category to which you are responding. Provide detailed responses using specific examples. If applying for both Adult and Dislocated Worker funds, please address both populations within your response. Resumes, job descriptions, required forms and supplemental attachments do not count toward the 30-page limit.

Organizational Structure and Capacity for Serving Target Community (25 points)

1. Provide a concise description of your organization including its legal status, governance structure, mission, vision, and values along with the major programs currently offered. Explain how your mission aligns with this funding opportunity.

2. If submitting as a partnership or collaborative, please identify all the partners or subcontractors (if applicable) and briefly explain their services, roles provided, expertise and rationale for participation in the program model. Attach detailed MOUs for members of the collaborative applicants.

3. Identify your target population/communities and describe the specific workforce needs or challenges for the demographic. Explain why job seekers will be better served through your organization than through the American Job Centers.

4. If your site is not located within one of the community areas listed, explain how you will ensure a preponderance of customers served will reside among the community areas and/or be part of the targeted populations. Provide a rational including data justifying why this community area/population is high need. Explain how your agency will address these needs.

5. Describe your organization's experience in providing workforce development services within your proposed target community and/or with the priority populations. Provide data on numbers served and placed from the target communities. If your agency experience does not include serving the targeted community, please provide experience in serving a similar demographic area.

6. Please identify the address of the site and describe the physical lay-out of the proposed service area including square footage of classrooms, resource rooms and available equipment (photographs encouraged). Identify the available technology within the resource area. Describe the access to public transportation and planned hours of operation. Identify the ADA compliance accessibility features of the site.

7. If you do not have a site in mind, explain your due diligence in identifying a community site, the desired features, how you will acquire the location before the period of performance begins.

8. Racial inequities are built into our regional and national economic systems. The national unemployment rate for Black and Hispanic workers remains higher at 9.2% and 8.6% respectively compared to 5.7% for White workers[ii]. White workers with a high-school diploma, on average, earn the same as Black workers with an Associate degree ($21/hour). According to the recent report, Advancing Workforce Equity in Chicago: A Blueprint for Action, produced in partnership with PolicyLink, Burning Glass Technologies, and the Chicagoland Workforce Funder Alliance, it has been proven that using sector-based workforce strategies can close the gap. Explain how your organization uses sector-based workforce development strategies to build pathways into good jobs for workers of color.

9. Please describe your agency's proposed staffing plan if awarded this contract. It should specify staffing levels and position titles. Identify key staff members by name and specify the educational levels, their tenure in both the role and with the organization. Attach resumes (not counted toward the program response limit) for proposed staff to be used on the project, including names, titles, job descriptions and whether the position is full or part-time. If you anticipate the creation of additional positions in response to this RFP, please provide job descriptions including qualifications sought and hiring criteria. Selected respondents are expected to have a director/supervisor who will oversee implementation of the grant along with 2 full time career coaches and 1 business service representative for this project.

10. Describe the diversity make up of your program staff and explain how it relates to the proposed demographics of the targeted communities.

11. Explain the agency's process for training new staff members on the regulations of WIOA and program requirements and overall professional development. How will the organization ensure quality case records and files are developed and maintained? Identify any special skills or certifications required of staff including fluency in other languages.

12. Identify the annual staff turnover rate for the past three years and explain any recent turnover of key positions. How does the organization ensure quality and consistency of work when staff leaves the organization?

***NOTE: In accordance with our values, The Partnership seeks to provide high quality services to our customers. We believe in the increased professionalization of the workforce development field and strive to ensure that our system reflects the dignity of work. Consequently, The Partnership requires that all career coach and business service representative positions receive a minimum salary of $34,000 per year, the generally accepted living wage for Cook County*.**

Job Seeker Services (20 points):

13. Identify the targeted geographic communities or special population. Briefly describe the community's workforce needs, available assets and resources in this neighborhood. How will your organization meet the specific needs of jobseekers in this community (ies)? Include any existing relationships with service providers and community-based organizations in the neighborhood and surrounding areas.

14. Describe in detail your strategies for outreach, recruitment, enrolling and orienting job seekers among the targeted communities and/or priority populations into your program. Please identify any unique recruiting methods, explain how you introduce your services and welcome prospective customers.

15. Describe the basic career services (outline in Section IV. C. of the RFP) offered to customers. including but not limited to workshops and job readiness training. Please describe any unique curricula, or workshops that you will provide for your targeted population.

16. Based on the identified communities please describe the anticipated or documented barriers of the population you propose to serve. What strategies do you plan to use to address these barriers?

17. Please describe your assessment process. Include a description of any tools, tests, or methods used to determine the following: levels of basic skills, work readiness, interests and aptitudes, occupational skills, and supportive service needs. How do you work with an individual to explore and identify a career goal? Describe how you assess customer's skills, aptitudes, interests, and motivations for work.

18. An Individual Employment Plan (IEP) is used to formulate employment goals, appropriate achievement objectives and the appropriate combination of services for the participant to achieve his or her employment goals. What methods will you employ to ensure the development and utilization of quality IEPs?

19. Identify your ratio of career coaches to registrants. Explain how you maximize that ratio without compromising quality services to job seekers. How do you assess customer satisfaction? Summarize the strengths and weaknesses of career coaching services identified by current and former clients

20. Describe your strategies for preparing participants for employment and matching job seekers to job leads. What tools do you use to make a good match and increase the likelihood of success in obtaining and performing the job?

21. Describe your strategies for post-placement participant follow-up? How do these strategies enhance job retention and career path growth?

Business Services (15 points):

22. List and describe your current and proposed business services. Identify successes and challenges in serving businesses. How will you incorporate a demand-driven approach to service delivery? Describe any plans or strategies for providing OJTs with employers. How will you market OJTs and services to employers?

23. Identify key business partners, provide an example of three (3) current/past employer engagements where you have identified and addressed a business need. Comprehensively explain both the process used and outcomes achieved.

24. Describe your strategies for pursuing new business relationships and securing job orders. Describe any experience with conducting hiring events or on-site recruitment.

25. Provide examples of past placements, including job titles, wages, and benefits. What strategies do you use to advance job quality among your business partners? How do you uphold the values of dignity of work and racial equity with your employers?

26. Provide an example of when your organization worked collaboratively with other organizations to meet a business's hiring need. Describe the need and any challenges presented. Provide details including roles and responsibilities of the parties and outcomes derived.

Past Performance and Planned Outcomes (15 points)

27. Explain your process for internally monitoring your on-going performance. How will you evaluate and assess both the effectiveness and quality of the program? Identify who will be responsible for data collection, analysis, reporting and general performance oversight.

28. Describe your ability and experience in meeting outcomes and benchmarks on workforce development grants in the past (three) 3 years. (Complete the attached **Grant Outcome History Form)** . Identify the performance measure results along with other key benchmarks and your outcomes such as: total served, total placements to plan, total OJTs, percent of positive exits.

29. Please identify three (3) references from funders or organizations other than The Partnership using the attached **Reference Form.** Please supply references who can attest to your ability in serving the population, achieving grant deliverables, and meeting performance benchmarks. Please ensure the accuracy of the contact information and obtain their permission to be listed as a contact. The Partnership will not contact respondents for updated reference contact information. The Partnership reserves the right to consider all previous performance data from workforce development programs.

30. Complete the attached **Proposed Planned Outcomes Form**. Provide an accompanying narrative that explains your strategies for achieving your planned performance.

31. Identify your planned cost per customer served and placed **for each funding stream** (Adult and Dislocated Worker) and explain how your program is cost effective. Describe any leveraged services or added benefits to the customer not previously mentioned.

32. Describe how customer feedback will be collected and used to make continuous improvements to services. Provide an example of a recent improvement or change made resulting from customer feedback.

Fiscal Narrative, Structure and Budget (25 points)

Program Budgets

All responding organizations must complete and attach the Budget Narrative and Budget Summary forms (Excel) for each requested funding stream/program model. Organizations must have separate spending plans for each proposed funding stream/program model, but they can all be included in one set of budget forms. Please include a copy of the proposed Budget Summary forms with the Program Response as well as with the Fiscal Narrative questions. All Budget Narrative and Budget Summary forms are posted with the RFP on The Partnership's website: https://chicookworks.org/our-network/request-for-proposals/

Please respond to the following Fiscal Narrative questions and submit the requested documentation including Budget narrative and Budget summary forms.

- **Answers to these questions do not count toward your page limit.**
- **Forms and attachments do not count toward page limits for Fiscal Narrative questions.**

Fiscal Narrative (no page limit)

1. What is your organization's legal status/registration? Briefly describe the entity's statutory reporting requirements.

2. Describe the basis upon which the requested amount was calculated. Identify an average cost per participant or program and provide an explanation to justify this unit cost. Identify the staff to participant ratio. If the organization is for-profit, identify the profit percentage built into the proposed budget, and describe the risk and other factors taken into consideration to arrive at this percentage. ***NOTE: Fixed Fees will be negotiated as a separate element of cost during the grant agreement negotiations.***

3. Describe any resources that will be leveraged for purposes of this proposal. . This may include cash contributions, staff effort, space, fee-for-service, or other revenue generation including in-kind contributions. In answering, list each source of leveraged resources, the dollar value, and the function of each leveraged resource, (e.g., spread operating costs or to broaden the scope of services). ***NOTE: Budgets must support this information with a breakdown of the funding from each leveraged source as it is utilized in the program.***

4. Describe your organizations' fiscal capacity and total annual budget, including a description of any previous (past 5 years) or current grants which exceed $100,000.00.

5. Does your organization perform its own accounting? If not, indicate the name, address, contact person, phone number, and email address of the accounting firm. If yes, describe the organizations' accounting/financial procedures and system of oversight. Describe the type of accounting software being utilized by either the organization or by the contracted third party.

6. Describe the payroll process/system including internal controls for accuracy and validity. What is the method for documenting employee time? Are time studies utilized? If so, how often are they prepared?

7. Describe how payroll expenditures are properly authorized, accurately recorded in a timely manner, and properly classified.

8. Describe the organization's method for administering participant payroll and/or stipends and tracking costs for supportive services. Are there current and detailed policies and procedures to guide fiscal activities and ensure staff accountability?

9. Describe how the organization will ensure that costs charged to the program are reasonable, allocable, allowable, and necessary.

10. Does your organization have an accounting system that allows for the proper recording of program financial transactions, including the allocation of expenditures in accordance with the respective components, disbursement categories, and sources of funds? If not, what accounting system will be used for the program?

    a. If staff or other costs charged to this budget will be shared between one or more funding sources, please detail the overall cost allocation plan for sharing costs, including the method of allocating shared costs. Attach a copy of your current Cost Allocation Plan (CAP). For guidance on preparing a cost allocation plan, please refer to the 2 CFR Part 200 Uniform Administration Requirements, Cost Principles and Audit Requirements https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=1&SID=c727d2b199e74b51562faa3fdc350b02&ty=HTML&h=L&mc=true&r=SECTION&n=se2.1.200_1416

11. Indicate what action has been taken in response to single audits and: a.) auditor's opinions or recommendations regarding internal controls; b.) cost disallowances; and c.) any other changes your organization has undertaken in response to single audits.

    a. ***NOTE:*** *Per (225 ILCS 460/4-Solicitation for Charity Act), the audit threshold for charitable organizations is gross receipts of* ***$300,000*** *or if the charity used a paid professional fund raiser and raised contributions in excess of* ***$25,000.***

12. Does your organization provide training on compliance and ethics? How often is this provided? Please provide the most recent date this training was provided.

13. Describe the organization's resource development experience and capacity to access various sources of funding to operate high-quality programs.

14. Describe the organization's sustainability plan if funding that supports this project is reduced. What actions would be taken to provide continuity of services to clients?

Description of other required fiscal attachments:

- **IRS Form W-9 Request for Taxpayer Identification Number and Certification**: All responding organizations must provide a completed form W-9 regardless of organization type. Form W-9 may be downloaded from the IRS website at https://www.irs.gov/forms-pubs/about-form-w-9.

  Non-governmental entities MUST also provide the following: 1.) indicate the year the organization was legally established; 2.) attach list of current Board Member names, business mailing addresses (other than responding organization's address), affiliations and titles, email addresses and phone numbers; 3.) if applicable, submit a current letter (within last three (3) years) from the IRS verifying the organization is exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, IRS Department of the Treasury, (877) 829-5500; 4.) submit a copy of the most recently filed IRS Form 990, Return of Organization Exempt from Income Tax.

- **IRS 501(c)(3) Tax Exempt Determination Letter**: If applicable, submit a current letter, dated within the last three (3) years, from the IRS verifying that the responding organization is tax exempt under Internal Revenue Code Section 501(c)(3).

- **Certificate of Good Standing**: Any respondent incorporated as a not-for-profit under the General Not for Profit Corporation Act of 1986 (805 ILCS 105/101.01 et seq.) is required to submit a Certificate of Good Standing from the Illinois Secretary of State's Office, Department of Business Services. A Certificate may be obtained through the Illinois Secretary of State's website at https://www.ilsos.gov/corporatellc/. The Department may be reached at (217) 782-6875; (217) 782-6961; or TTY: (888) 261-5280.

  Any respondent organized as a charitable not-for-profit (including any individual, group of individuals, association, or other legal entity) under the Charitable Trust Act (760 ILCS 55/1 et seq.) is required to submit a Certificate of Good Standing from the Office of Illinois Attorney General, Charitable Trust Bureau, 100 W. Randolph Street, 11th floor, Chicago, IL 60601. The Bureau may be reached at (312) 814-2595 and TTY: (800) 964-3013, or https://www.illinoisattorneygeneral.gov.

Entities that are neither of the above but are exempt from paying sales/use tax under the Use Tax Act (35 ILCS 105/1 et seq.) are required to submit a copy of the tax exemption certificate issued by the Illinois Department of Revenue, Regional Office Locations: Chicago, James R. Thompson Center – 7th floor, 100 West Randolph Street, Chicago, IL 60601, (800) 732-8866; Des Plaines, Suburban North Regional Building, 9511 Harrison Street, Des Plaines, IL 60016, (800) 732-8866, or https://www.revenue.illinois.gov.

- **Most Recent Audited Financial Statements**: Include Single Audit (if applicable), management letter, and federal and state tax returns (Form 990 / Form AG990-IL informational returns). Entities whose total public contributions (fundraising activities) in a single year are below the State of Illinois audit threshold should provide their most recent 2-year comparative financial statements (e.g., statements of financial position, statements of activities, statements of cash flows, and statements of functional expenses), if applicable.

  NOTE: *Per (225 ILCS 460/4-Solicitation for Charity Act), the audit threshold for charitable organizations is gross receipts of* ***$300,000*** *or if the charity used a paid professional fund raiser and raised contributions in excess of* ***$25,000.***

- **List of Board Members**: All non-governmental responding organizations must submit a list of current board members including names, affiliations, and titles (officers and professional titles), business mailing addresses (other than responding organization's address), email addresses, and phone numbers. ***On this document, indicate the year the organization was legally established.***

- **Cost Allocation Plan**: Include your Cost Allocation Plan (CAP). For guidance on preparing a CAP, refer to Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (available electronically at https://www.ecfr.gov/cgi-bin/text-idx?SID=54ede6d0d7aac0c36aab76d75373e48f&mc=true&node=pt2.1.200&rgn=div5).

- **Indirect Cost Rate Determination Letter**: If your organization has been approved for an indirect cost rate, include a copy of the most recent Indirect Cost Rate Determination Letter from the cognizant agency.

- **Segregation of Duties Form**: Each organization must complete and submit a current Segregation of Duties Form. The form is posted with the RFP on The Partnership's website: https://chicookworks.org/our-network/request-for-proposals/

4. Proposed Budgets

Budget forms and instructions are posted with this RFP on The Partnership's website at https://chicookworks.org/our-network/request-for-proposals/ . Respondents **must submit a budget for each funding stream for which they are applying (Adult and/or Dislocated Worker)**

The budget forms must be submitted as an Excel spreadsheet file as part of the complete proposal. The budget forms must be signed by an authorized /organization signatory.

Private for-profit organizations should indicate anticipated program fixed fees over program costs in the space provided on Budget Form 3. Fixed Fees will be negotiated as a separate element of cost during the grant agreement negotiations. For more information see The Partnership Policy Letter, "Cost Plus Fixed Fee "Fixed Fee Policy

SECTION IX. Electronic Submittal Procedures and Requirements

A. Submittal Procedure and Format

For each proposal submitted, please respond to the Delegate Agency Organizational Leadership Survey (formsite.com). This survey will capture demographic information and basic respondent contact information for tracking purposes.

All proposals must be submitted in **electronic form to DELEGATE AGENCYRFP@chicookworks.org** Any material considered proprietary must be so designated by annotation within the document.

For the purposes of electronic submission, originals are scans of paper documents that contain **original signatures in blue ink or electronic signatures** of the President, CEO, or equivalent person with legal signature authority for the organization and **marked "Original."** If your organization is unable to provide scanned signature originals, include unsigned forms in your proposal and include the following statement in the email body of your proposal submission: "Respondent requires electronic signature follow-up."

The Partnership will contact your organization to obtain the electronic signature of its authorized signatory following receipt of your proposal. Please note that the electronic signature process may occur after the proposal submittal deadline. Proposals that include unsigned forms but are otherwise complete will be considered complete at the time of submission so long as respondents comply with the instructions herein regarding electronic signature follow-up.

Narrative responses must be formatted as follows:

- 8.5 x 11-inch (letter size)
- One-inch margins
- 12-point font
- Double spacing
- Numbered pages with organization name in footer
- Page break for each new section with clear section header

Submit your complete RFP for **each proposed** site **by email** with sections organized as follows:

Delegate Agency Organizational Leadership Survey	Delegate Agency Organizational Leadership Survey (formsite.com)
Subject Line of Email	"Delegate Agency" + Organization Name + Proposed Geographic Area or Target Population
Body of Email	List of Email Attachments Organization Name Organization Address Contact Person for Proposal Contact Email and Phone Number
Attachment 1 **Named: "Delegate Agency +Organization Name + Proposed Geographic Area or Target Population Program Narrative"** **As one PDF** (Fillable forms are available on The Partnership website) https://chicookworks.org/our-network/request-for-proposals/	Respondent Information Form Executive Summary Program Narrative Response Memorandum of Understanding (MOU) with partners (if applicable) Staff Resumes and/or Job Descriptions Proposed Planned Outcomes Form Grant Summary Form Reference Form

Attachment 2 **Named "Delegate Agency + Organization Name Fiscal"** **As <u>one</u> PDF** **NOTE: If applying for multiple sites only one fiscal information packet PDF is needed.**	Fiscal Narrative Response to Questions Fiscal Questionnaire Completed W-9 Request for Taxpayer Identification Number and Certification IRS 501(c)(3) Tax Exempt Determination Letter dated within past 3 years (required only if applicable) Certificate of Good Standing Most Recent Audited Financial Statements List of Board Members including year organization legally established Cost Allocation Plan Indirect Cost Rate Determination Letter (required only if applicable) Segregation of Duties Form
Attachment 3 **Named "Delegate Agency + Organization Name Budget Narrative"** **As PDF**	Budget Narrative Form for each applicable Title (Adult, Dislocated Worker,)
Attachment 4 **Named "Delegate Agency + Organization Name Budget"** **As Excel**	Budget Summary Forms for each applicable Title (Adult, Dislocated Worker,)

Submittal Address and Deadline
Completed RFP responses must be submitted **electronically to DelegateRFP@chicookworks.org**

RFP responses must be received **before or by 4:00 PM CDT on Friday, July 30, 2021**. **<u>Proposals received after this date and time will not be accepted.</u>**

Technical Problems with Submission
If you experience a technical problem when submitting your proposal (e.g., file size is too large), immediately email RFPquestions@chicookworks.org to explain the problem. Enter "submission problem" and your organization name in the email subject line.

If you experience a technical problem when submitting your proposal within three (3) hours of the submittal deadline, email RFPquestions@chicookworks.org as instructed above and call:
RFP Submission Support Hotline: (312) 848-7174*
***Calls to this number will only be answered within three (3) hours of the submittal deadline, from 12:00 p.m. to 4:00 p.m. on Friday, July 30, 2021. Do not call this number at any other time.

<u>SECTION X. Required Forms</u>

The following is a list of required forms to be submitted with your proposal. The forms may be downloaded in a fillable format on The Partnership website at https://chicookworks.org/our-network/request-for-proposals

A. DELEGATE AGENCY Title I Provider Checklist

Respondent Name: _____

Proposed DELEGATE AGENCY Location: _____

Please use the following checklist to confirm all the documents are included in your packet.

Program Forms

- Delegate Agency Organizational Leadership Survey (formsite.com)
- Respondent Information Form
- Memorandum of Understanding (MOU) with partners if applicable
- Executive Summary
- Program Narrative Response (30 pages maximum)
- Job Titles and Descriptions
- Resumes Organized by Job Title
- Proposed Planned Outcomes Form
- Grant Summary Form
- Reference List Form
- Organizational Chart

Fiscal Forms

- Financial Narrative Response
- Budget Summary Forms for each funding source
- Budget Narrative Form
- Fiscal Questionnaire
- Segregation of Duties Form
- IRS W-9 Request for Taxpayer Identification Number and Certifications
- Certificate of Good Standing or Tax Exemption Certificate
- Copy of most recent financial audit
- Cost Allocation Plan
- List of Board Members

B. Respondent Information Form

Legal Name of Applicant Agency			
Geographic Area and/or Priority Population			
Number of Years in Business			
FEIN Number			
DUNS Number			
Type of Organization	o Educational Institution o Minority Business Enterprise o Female Business Enterprise o Disadvantaged Business Enterprise	o Private for Profit o Private Not-for–Profit o Unit of Government	
Address – Administrative Office	Address		
	City, State ZIP		
	Web Site URL		
Address of Primary Service Location – This is the location where the services described in this application will be provided.	Address		
	City, State ZIP		
Answer YES, if applying for Partnership site at 10325 South Halsted Street, Chicago, Illinois			
Principal of Agency – CEO/Executive Director/President	Name		
	Title		
	Email Address		
	Phone		
Programmatic Contact Person	Name		
	Title		
	Email Address		
	Phone		
	Amount Requested	**Total Served**	**Cost Per Served**
Adult Funding	$	#	$
Dislocated Worker Funding	$	#	$
Total Amount Requested	$	#	$
Amount of Leverage Funds			
Percentage of Leverage Funds			

C. Respondent Grant History Form

Please complete the attached Grant History Form for all **Workforce Programs received** within the past three years regardless of source. If the nature of the grant does not match the goals and outcomes identified here, please identify and include primary goals and outcomes of the grant.

Organization NAME:	
RESPONDENT GRANT HISTORY FORM	
Identify Funder	
Funding Type	
Award Amount	
Time Period	
Planned Enrollment Goal	
Actual Enrollments	
Planned Placement Goal	
Actual Placements	
Other Benchmarks Planned	
Other Benchmarks Achieved	
Identify Funder	
Funding Type	
Award Amount	
Time Period	
Planned Enrollment Goal	
Actual Enrollments	
Planned Placement Goal	
Actual Placements	
Other Benchmarks Planned	
Other Benchmarks Achieved	
Identify Funder	
Funding Type	
Award Amount	
Time Period	
Planned Enrollment Goal	
Actual Enrollments	
Planned Placement Goal	
Actual Placements	
Other Benchmarks Planned	
Other Benchmarks Achieved	

D. Respondent References Form

Please identify three references from funders or organizations that can attest to the organization's ability to serve the target communities, priority population and meet benchmarks. Please ensure the accuracy of the contact information and inform references of The Partnership's reference checking process. By identifying a reference, Respondent authorizes the reference to release organizational information and performance data to The Partnership.

Organization NAME:	
REFERENCE LIST INFORMATION	
Reference #1 Organization Name	
Reference #1 Contact Person Name	
Reference #1 Contact Phone Number	
Reference #1 Email Contact	
Reference #1 Nature of Relationship	
Reference #2 Organization Name	
Reference #2 Contact Person Name	
Reference #2 Contact Phone Number	
Reference #2 Email Contact	
Reference #2 Nature of Relationship	
Reference #3 Organization Name	
Reference #3 Contact Person Name	
Reference #3 Contact Phone Number	
Reference #3 Email Contact	
Reference #3 Nature of Relationship	

E. Planned Outcome Form

DELEGATE AGENCY Title I PROPOSED PLANNED OUTCOMES		
Organization Name:		
	Proposed Planned Numbers	
Benchmark	**Adult**	**Dislocated Workers**
Proposed Number of Served		
Proposed Number of New Enrollments		
Proposed Number of OJTs		
Proposed Number of Placements		
Proposed Number of Business Served		
Proposed Planned Minimum Active Case Level		
Overall Cost Per Served *(Requested amount/total served*		
Overall Cost Per Minimum Active Case Level *(Requested amount/ planned minimum active level)*		
Overall Cost Per Placement *(Requested amount/total placed)*		

F. Fiscal Questionnaire

Organization Name:		
Is the agency a not-for-profit or a for-profit entity?	Not-for-profit	For Profit
Is the agency subject to the A-133 Single Audit requirement (Federal funding of $750,000 or more effective with fiscal years starting January 1, 2015 and forward)?	Yes	No
Does the agency do its own accounting? If no, indicate the name and address of the accounting firm below.	Yes	No
Name:		
Address:		
Contact Person:		
Phone Number:		
If the agency does its own accounting, what accounting software does it utilize?		
Does the agency have a current financial procedures manual?	Yes	No
If yes, how often is it reviewed and updated?		
Does the agency have a written cost allocation plan? If yes, please submit.	Yes	No
If yes, what allocation methodology is used?		
Does the agency have an approved Indirect Cost Rate by a cognizant agency? If yes, please submit.	Yes	No
Does the agency have a conflict-of-interest policy? If yes, please submit.	Yes	No
How often is a trial balance prepared?		
Accounting System Disbursements/Reconciliation		
Are all disbursements made by check?	Yes	No
Are all checks pre-numbered?	Yes	No
Who is authorized to sign checks? Please indicate name and title(s).		
How often is the bank reconciliation prepared?		
Please provide the name, address, and phone number of the agency's auditing firm below.		
Name:		
Address:		
Contact Person:		
Phone Number:		

FORM G: Segregation of Duties Form

Segregation of Duties: List employee names and job titles across top and mark duties performed by each employee.

Organization Name:							
Name of Employee:							
Title of Employee							
Approves Purchase Orders							
Verifies Receipt of Order							
Signs Manual Check							
Signs Machine Check							
Custodian of Check Signing Device							
Custodian of Blank Checks							
Prepares Checks for Payment							
Distributes Checks							
Reviews Checks Post Printing							
Post Disbursements							
Computes Cost Allocations							
Computes Cost Allocations							
Receives Cash							
Posts Receipts							
Deposits Receipts							
Custodian of Petty Cash							
Petty Cash Replenishment							
Audits Petty Cash							
Bank Reconciliations							
Maintains General Ledger							
Prepares Financial Statements							
Approves Financial Reports							
Approves Payments							
Access to use LWIA Automatic Teller/Debit Cards							

SECTION XI. Appendix--Definitions

Assessment: The process by which applicants are interviewed to determine their employability, motivation, aptitude, family situation, education and training, attitudes, transportation, support needs, abilities and interests in order to assist in developing an Individual Employment Plan for the attainment of the individual's career goals. Testing and counseling are a part of the assessment process.

Basic Career Services (Universal Services): Career services which must be made available to all individuals seeking services in the WIOA delivery system including: determination of eligibility; outreach, intake, orientation; initial skills assessment including literacy, numeracy, and English language proficiency as well as aptitudes, abilities and supportive service needs; labor exchange services; in-demand industry sectors and occupations; information on nontraditional employment; referrals to and coordination of activities with other programs and services; workforce and labor market statistics; job vacancy listings; information relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance; information and assistance regarding filing claims under UI programs, including meaningful assistance to individuals seeking assistance in filing a claim.

Basic Skills Deficient: The label given an individual who computes or solves problems, reads, writes, or speaks English at or below the eighth-grade level or is unable to speak English at a level necessary to function on the job, in the individual's family, or in society.

Business Relations and Economic Development: The Business Relations and Economic Development unit of The Partnership supports the regional business community's growth and stability by leveraging economic and workforce development strategies and resources. This team engages the city and county economic development departments, regional chambers of commerce, and other regional workforce development partners to identify opportunities to provide innovative, quality, and integrated services to regional employers. This unit also leads cohorts of Business Services Teams to create a system-wide approach for continuity in the delivery of public workforce system services to regional business customers.

Career Connect: The Partnership's integrated workforce data system that will be used to record and track all job seeker information including eligibility information, service plans and employer services including posting and filling job orders.

Case Management: The provision of a participant-centered approach in the delivery of services, which are designed to ensure and coordinate individual comprehensive employment plans, such as service strategies, for customers to ensure access to necessary Workforce Innovation and Opportunity Act funded activities and supportive services, using, where feasible, computer-based technologies; and to provide job and career counseling during program participation and after job placement.

Credential: An industry or state recognized degree or certificate or state/local recognized credential. These include, but are not limited to high school diploma, GED, or other recognized equivalents, post-secondary degrees/certificates, recognized skill standards, and licensure or industry-recognized certificates designed to equip individuals to enter or re-enter employment, retain employment, or advance into better employment. (TEGL 17-05)

Customized Training: Training that is designed to meet the special requirements of an employer (including a group of employers); that is conducted with a commitment by the employer to employ an individual on successful completion of the training; and for which the employer pays a significant portion of the cost of training.

Economically Disadvantaged: An individual who received an income or is a member of a family that received a total family income that, in relation to family size, does not exceed the higher of the poverty line, or 70 percent of the Lower Living Standard Income Level (LLSIL).

Eligible (Eligibility): Refers to an individual's ability to receive services under the Workforce Innovation and Opportunity Act.

Enrollment: Refers to the completed process by which an eligible participant has been referred for WIOA services and for whom required documents have been completed and entered Career Connect or the State's tracking system, Illinois Workforce Development System (IWDS).

Illinois JobLink: Illinois JobLink is a website developed and maintained by the Illinois Department of Employment Security (IDES). Illinois JobLink is a resource that provides links and tools that the regional business community can use to access tax credit and labor market information, as well as post position vacancies and access a database of resumes.

Illinois WorkNet™: IllinoisworkNet.com is a free resource that provides career, education and work support information for all Illinois residents and businesses. IllinoisworkNet.com connects individuals looking for employment with employers looking for workers through the convenience of a user-friendly website and onsite locations throughout the state. The program aims to cultivate a well-trained workforce by providing valuable resources for the state's workforce, creating a solid foundation for a thriving 21st century economy.

Individual Employment Plan (IEP): A plan developed for a job seeker identifying the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services required for the participant to achieve the employment goals.

Incumbent Worker Training: Training designed to meet the special requirements of an employer (or group of employers) for a skilled workforce or to avert the need to lay off employees by assisting the workers in obtaining the skills necessary to retain employment. Training is conducted with a commitment by the employer to retain or avert the layoff of the incumbent worker.

Job Retention: The period an individual remains in an unsubsidized job following placement. The period of required retention is determined in accordance with WIOA, or as dictated by the funder as appropriate to the individual.

Job Search Assistance: Training, which provides the customer with the instruction and necessary skills to obtain full time employment. These skills may include resume writing, interviewing skills, telephone techniques and networking. Job search assistance must be offered to all customers and may be delivered individually or in group settings.

Job Development: The planned and organized effort by agency representatives to encourage employers or business organizations to make jobs available for WIOA customers.

On-the-Job Training (OJT): Training by an employer that is provided to a paid participant while engaged in productive work in a job that:

1. Provides knowledge or skills essential to the full and adequate performance of job.
2. Provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and the additional supervision related to the training; and

3. Is limited in duration as appropriate to the occupation for which the participant is being trained; considering the content of the training, the prior work experience of the participant, and the individualized services training and employment plan (ISTEP).

Registered Apprenticeship: A program approved and recorded by the U.S. Department of Labor Employment and Training Administration Bureau of Apprenticeship and Training or by a recognized state apprenticeship agency or council. Approval is by certified registration or another appropriate written credential.

Registered Participant: A person, who has been certified eligible, recorded in IWDS (or Career Connect) and has been provided at least one Career Service.

Shared Placement: A job placement is considered a shared placement when the agency that made the job placement is not the agency with which the WIOA participant is registered and receiving career services. Shared placements are to be recorded as such in Career Connect by the agency that made the placement.

Supportive Services: Services such as transportation, childcare, dependent care, housing, and needs-related payments that are necessary to enable an individual to participate in activities authorized under WIOA.

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[i] Langston, Abbie, Matthew Walsh, and Edward Muña. "Advancing Workforce Equity in Chicago: A Blueprint for Action." *The National Fund for Workforce Solutions,* 26 January 2021, https://nationalfund.org/learning-evaluation/publications/advancing-workforce-equity-in-chicago/. Accessed 24 February 2021.
[ii] Bureau of Labor Statistics, Monthly Employment Status by Race for January 2021, https://www.bls.gov/cps/demographics.htm#race.