



County of San Luis Obispo

# GENERAL SERVICES AGENCY

JANETTE PELL, DIRECTOR

**REQUEST FOR PROPOSAL #1286**  
**Workforce Innovation and Opportunity Act,**  
**America's Job Center of California Operator Services**

October 17, 2014

The County of San Luis Obispo (County) is currently soliciting proposals for professional services for Workforce Innovation and Opportunity Act (formerly Workforce Investment Act (WIA)), America's Job Center of California Operator Services.

Each proposal shall specify each and every item as set forth in the attached specifications. Any and all exceptions must be clearly stated in the proposal. Failure to set forth any item in the specifications without taking exception may be grounds for rejection. The County reserves the right to reject any and all proposals and to waive any irregularity or informality in any proposal or in the Request for Proposal process, as long as, in the judgment of the County, such action will not negate fair competition and will permit proper comparative evaluation of the proposals submitted.

This Request for Proposal is posted on the County's Purchasing website at [http://www.slocounty.ca.gov/GSA/Purchasing/Current\\_Formal\\_Bids\\_and\\_Proposals.htm](http://www.slocounty.ca.gov/GSA/Purchasing/Current_Formal_Bids_and_Proposals.htm). Any changes, additions, or deletions to this Request for Proposal will be in the form of written addenda issued by the County. Any addenda will be posted on the website. Prospective proposers must check the website for addenda or other relevant new information during the response period. The County is not responsible for the failure of any prospective proposer to receive such addenda. All addenda so issued shall become a part of this Request for Proposal.

If your firm is interested and qualified, please submit one (1) electronic copy of your proposal, in Adobe Acrobat Portable Data Format (pdf), through the County's Purchasing website at the address listed above, by **3:00 p.m. on November 21, 2014.**

All questions pertaining to the content of this Request for Proposal must be made in writing through the [County's Purchasing website](#). All questions will receive a response within five (5) business days. Questions and responses will be posted (anonymously) on the Purchasing website, and can be viewed by accessing the Request for Proposal. The County reserves the right to determine the appropriateness of comments / questions that will be posted on the website.

If you have any questions about the proposal process, please contact the Buyer directly.

[Buyer (ALL CAPS)]  
Buyer – GSA Purchasing  
[Buyer@co.slo.ca.us](mailto:Buyer@co.slo.ca.us)

## AIRPORTS

**Kevin Bumen, C.A.E.**

*General Manager*

903-5 Airport Drive  
San Luis Obispo, CA 93401  
[805] 781-5205  
[www.sloairport.com](http://www.sloairport.com)

## COUNTY PARKS

**Curtis Black**

*Deputy Director*

1087 Santa Rosa Street  
San Luis Obispo, CA 93408  
[805] 781-5930  
[www.slocountyparks.org](http://www.slocountyparks.org)

## FINANCE & PURCHASING

**Cody VanDorn**

*Department Administrator*

1087 Santa Rosa Street  
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[www.slocounty.ca.gov/gsa](http://www.slocounty.ca.gov/gsa)

## GENERAL SERVICES

**Machelle Vieux**

*Deputy Director*

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## INFORMATION TECHNOLOGY

**Daniel Milei**

*Deputy Director*

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**LOCAL VENDOR PREFERENCE**

The County has established a local vendor preference. When quality, service, and other relevant factors are equal, responses to Requests for Proposals will be evaluated with a preference for local vendors. Note the following exceptions:

1. Those contracts which State Law or, other law or regulation precludes this local preference.
2. Public works construction projects.

A "local" vendor preference will be approved as such when, 1) The vendor conducts business in a fully staffed office with a physical address within the County of San Luis Obispo; 2) The vendor holds a valid business license issued by the County or a city within the County; and 3) The vendor has conducted business at the local address for not less than six (6) months prior to the due date of this Request for Proposal..

Proposals received in response to this Request for Proposal will be evaluated by the Selection Committee considering the local vendor preference described above when quality, service and other relevant factors are equal. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200.

|   | YES | NO |
|---|-----|----|
| Do you claim local vendor preference?   |     |    |
| Do you conduct business in an office with a physical location within the County of San Luis Obispo? |     |    |
| Business Address: _____<br>_____  |     |    |
| Years at this Address: _____  |     |    |
| Does your business hold a valid business license issued by the County or a City within the County?  |     |    |
| Name of Local Agency which issued license: _____  |     |    |

Business Name: \_\_\_\_\_

Authorized Individual: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Dated: \_\_\_\_\_

**Workforce Investment Act, America's Job Center of California Operator Services****PROPOSAL SUBMITTAL AND SELECTION**

1. All proposals must be submitted to the County's Purchasing website in Adobe PDF format no later than 3:00 p.m. on Friday, November 21, 2014. Late proposals will not be considered.
2. All costs incurred in the preparation and submission of proposals and related documentation will be borne by the proposer.
3. Upon receipt of proposals, staff will use the Proposal Checklist (Attachment 1) to review submitted proposals for completeness and technical compliance with applicable legal and regulatory requirements and the terms and conditions of this RFP. Incomplete proposals or those clearly found to be inconsistent with legal, regulatory, or RFP requirements will be eliminated.
4. Selection of qualified proposers will be by an impartial Selection Committee made up of WIB members, outside WIA experts, and County staff. Committee members will use an approved County procedure for awarding professional contracts. Each member will individually review the proposals using the criteria outlined in Attachment 2 -Evaluation Criteria, and then meet to discuss their ratings. Selection will be made on the basis of the proposals as submitted, although the County reserves the right to interview applicants as part of the selection process. Committee recommendations will be taken to the SLO WIB for approval. The proceedings of the Selection Committee are confidential, and members of the Selection Committee are not to be contacted by the proposers.
5. This Request for Proposal does not constitute an offer of employment or to contract for services.
6. The County reserves the option to accept or reject any or all proposals, wholly or in part, received by reason of this request, and make more than one award, or no award, as the best interests of the County may appear.
7. All documents submitted to the County in response to this Request for Proposal will become the exclusive property of the County.
8. All proposals shall remain firm for ninety, (90) days following closing date for receipt of proposals.
9. The County reserves the right to award the contract to the firm who presents the proposal which in the judgment of the County, best accomplishes the desired results, and shall include, but not be limited to, a consideration of the professional service fee.
10. Any contract awarded pursuant to this Request for Proposal will incorporate the requirements and specifications contained in this Request for Proposal. All information presented in a proposer's proposal will be considered binding upon selection of the successful proposer, unless otherwise modified and agreed to by the County during subsequent negotiations.
11. The successful proposer is expected to execute a contract similar to the contract in Appendix A including WIA Certifications and Assurances\* (Appendix B) (\*it is anticipated that following the implementation of WIOA this document will be updated/revised to reflect changes brought about by WIOA and a new, WIOA Certifications and Assurances document will be provided and require the signature and compliance of the successful proposer). This sample contract is for reference to the anticipated terms and conditions governing the County and the successful proposer. The proposer must take exception in their proposal to any section of the attached contract they do not agree with. Failing to do so will be deemed as acceptance by the proposer to the terms spelled out in the sample contract. The County reserves the right, in its sole discretion, to add, delete, or modify, or negotiate additional terms and conditions to the attached contract. BEFORE BEGINNING ANY WORK OR SUBMITTING A PROPOSAL IT IS ADVISED THAT PROPOSERS READ THE COUNTY INSURANCE AND INDEMNIFICATION REQUIREMENTS IN THE ATTACHED SAMPLE

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CONTRACT. The selected proposer will be asked to provide evidence that County insurance requirements have been met.

12. Under the provisions of the California Public Records Act (the "Act"), Government Code section 6252 et seq., all "public records" (as defined in the Act) of a local agency, such as the County, must be available for inspection and copying upon the request of any person. Under the Act, the County may be obligated to provide a copy of any and all responses to this Request for Proposal, if such requests are made after the contract is awarded. One exception to this required disclosure is information which fits within the definition of a confidential trade secret [Government Code section 6254(k)] or contains other technical, financial or other data whose public disclosure could cause injury to the proposer's competitive position. If any proposer believes that information contained in its response to this Request for Proposal should be protected from disclosure, the proposer MUST specifically identify the pages of the response that contains the information by properly marking the applicable pages and inserting the following notice in the front of its response:

***NOTICE:** The data on pages \_ of this response identified by an asterisk (\*) contain technical or financial information, which are trade secrets, or information for which disclosure would result in substantial injury to the proposer's competitive position. Proposer requests that such data be used only for the evaluation of the response, but understands that the disclosure will be limited to the extent the County considers proper under the law. If an agreement is entered into with the proposer, the County shall have the right to use or disclose the data as provided in the agreement, unless otherwise obligated by law.*

The County will not honor any attempt by proposer to designate its entire proposal as proprietary. If there is any dispute, lawsuit, claim or demand as to whether information within the response to the Request for Proposal is protected from disclosure under the Act, proposer shall indemnify, defend, and hold harmless, the County arising out of such dispute, lawsuit, claim or demand.

**SOLICITATION INFORMATION**

The primary point of contact for information on this procurement is:

Dawn Boulanger, WIA Program Manger  
Department of Social Services  
San Luis Obispo County  
dboulanger@co.slo.ca.us

During the proposal and evaluation process, the individual identified above is the sole contact point for any inquiries or information relating to this RFP. Proposers should not contact WIB members, (current roster of WIB members can be found on the SLO WIB website at [sloworkforce.com](http://sloworkforce.com) under the Members tab) staff, or elected officials charged with oversight of these programs during the review process to avoid conflicts of interest, appearance of conflicts of interest, or undue influence over the process. Proposers should review Attachment 3 regarding ex parte communication prohibition and conflict of interest and utilize the Conflict of Interest Certification form as applicable. Any violation of this procedure may be grounds for disqualification of the Proposer.

Questions concerning this RFP, the application process, or programming issues must be made in writing through the [County's Purchasing website](#). All questions will receive a response within five (5) business days. Questions and responses will be posted (anonymously) on the Purchasing website, and can be viewed by accessing the Request for Proposal. The County reserves the right to determine the



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sole source the services. Any subcontractor shall be the subject of the same provisions as the Contractor. Contractor shall be fully responsible for the performance of any subcontractor.

Opportunities for Leveraging:

It is the intent of the WIB to efficiently use WIOA funding and ultimately provide the highest quality services to the maximum number of employers and eligible job seekers. It is increasingly important to leverage a wide range of public and private resources to support workforce services and therefore service strategies that leverage resources and coordination efforts with other entities are preferred.

Applicants are discouraged from submitting proposals with budgets that are entirely dependent upon WIOA funds to support the program design. Submissions are encouraged to demonstrate either in-kind or cash match resources from any variety of funding sources. Proposers shall indicate on Attachment 4 (Leveraged Resources) their identified non-WIOA resources.

**INTRODUCTION AND OVERVIEW**

The San Luis Obispo County Workforce Investment Board (WIB) is soliciting proposals for the delivery of services under the Workforce Innovation and Opportunity Act (WIOA) comprised of Adult and Dislocated Worker programs and the operation of an America's Job Center of California (AJCC) one-stop service delivery site in San Luis Obispo County. Federal legislation directing the public employment and training system is in the midst of change. The Workforce Investment Act (WIA) is the federal law that governs the public workforce development system in the United States. WIA was signed into law on August 7, 1998 and concludes on June 30, 2015. The passing of The Workforce Innovation and Opportunity Act (WIOA) on July 22, 2014 provides new authorizing legislation for the programs authorized under WIA. Implementation of WIOA will take place on July 01, 2015 with guidance, technical assistance tools and resources under development. Performance accountability provisions take effect on July 1, 2016. An overview of WIOA and resulting service implications is described in the WIOA Overview section of this RFP. Additional information regarding WIOA including a WIOA factsheet from the Department of Labor can be found at the California Workforce Association (CWA) website at [calworkforce.org](http://calworkforce.org).

Additionally, California has joined the national re-branding campaign changing the former One-Stop public employment training system (i.e. Business and Career One-Stop) to the state-wide America's Job Center of California (AJCC) system.

The San Luis Obispo County Department of Social Services (hereafter referred to as "County") is the designated Administrative Entity and Fiscal Agent for the WIB and will administer the WIOA funds through contractual agreement with the selected proposer. Eligible applicants include governmental organizations, community and technical colleges, local education agencies, and private for-profit or non-profit nonsectarian organizations. Agencies should have facilities and/or remote service delivery strategies to implement services in the area(s) they are proposing to serve; or present in their proposal, a plan describing how they would provide county-wide services and a timeline with tasks to be accomplished in order to meet the prescribed date for client services to begin. Proposals must demonstrate capacity to provide or access a range of services for all employers and job seekers county-wide.

Individual or collaborative proposals submitted must apply to offer all services associated with operating Adult and Dislocated Worker programs, employer services, site management of at least one comprehensive America's Job Center of California (AJCC) site, and performance management. Proposals may be submitted by an individual organization or by a lead organization on behalf of a collaborative of agencies.

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All WIOA client services funded through this RFP must be provided at the AJCC site(s) unless staff are co-located at partner agencies. The County requires providers to leverage resources and build coalitions that result in an innovative, responsive and cohesive system. All Management Information System (MIS) activity related to the AJCC site will be conducted in the CalJOBS system, the statewide MIS. All contractors awarded funds due to this announcement will be required to serve those participants already enrolled (including follow up participants) in the WIA/WIOA Adult and Dislocated Worker Programs as of June 30, 2015.

SLO WIB is looking for proposals from well qualified bidders with extensive experience and demonstrated performance in managing and operating successful employment and training programs. Proposals must demonstrate:

- Bidder's ability to effectively and efficiently manage Federal and State funds;
- The maximum amount of funds is spent on participant services;
- Overhead and administrative costs are minimized;
- Jobseekers will become competitive job candidates;
- Alignment with county sector strategies, the area's Local Plan and WIB strategic initiatives.

**LOCAL WORKFORCE DEVELOPMENT AREA OVERVIEW**

The SLO WIB is the policy and planning body for the local workforce development area (LWIA). The SLO WIB brings together business and community leaders, appointed by the San Luis Obispo County Board of Supervisors, to promote and expand workforce development activities to ensure the long-range economic vitality of the region. The SLO WIB oversees the San Luis Obispo County AJCC one-stop service delivery system and provides a portion of the funding necessary to operate the system through the WIA/WIOA Adult and Dislocated Worker programs.

With this solicitation, the SLO WIB hopes to maintain successful referral and follow up mechanisms across agency partnerships, the continued implementation of an integrated and streamlined workforce development system, and improved service delivery to our employer and job seeker customers. It is the intent of the SLO WIB to continue the practice of functional alignment among AJCC partners, particularly those housed on-site at the AJCC through an integrated service delivery model wherein all AJCC staff implement the full array of WIOA services. The AJCC operator will have primary responsibility for ensuring that system services support employment and training and further will ensure that the individual employment and training options are aligned with local labor market intelligence and partner services at the AJCC.

All proposers are encouraged to review the LWIA's [Local Plan](#). AJCC sites must also meet the physical and program access standards in law, including [ADA Title II Regulations](#) and [Title 24 of the California Building Code](#).

**WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) OVERVIEW**

The Workforce Innovation and Opportunity Act (WIOA) will help job seekers and workers access employment, education, training, and support services to succeed in the labor market and match employers with skilled workers they need to compete in the global economy. WIOA was signed into law on July 22, 2014. In general, the Act takes effect on July 01, 2015. The State Unified Plans and Common Performance Accountability provisions take effect July 01, 2016. The U.S. Department of Labor will issue further guidance on the timeframes for implementations of these changes. WIOA reaffirms the role of the American Job Center system, a cornerstone of the public workforce investment system, and brings

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together and enhances several key employment, education, and training programs.

WIOA creates a streamlined workforce development system by:

- Applying a single set of outcome metrics to every federal workforce program under the Act.
- Creating smaller, nimbler and more strategic state and local workforce development boards.
- Strengthens alignment between local workforce areas and labor markets and economic development regions.
- Integrating intake, case management and reporting systems while strengthening evaluations.
- Eliminating the "sequence of services" and allowing local areas to better meet the unique needs of individuals.
- Supporting access to real-world education and workforce development opportunities through:
  - On-the-job, incumbent worker and customized training
  - Industry or sector partnerships and career pathway strategies
- Aligning workforce development programs with economic development and education initiatives.
- Enabling businesses to identify in-demand skills and connect workers with the opportunities to build those skills.
- Ensuring individuals with disabilities have the skills necessary to be successful in businesses that provide competitive, integrated employment.

**PROPOSAL FORMAT**

A qualifying proposal must address all of the following points and shall be in the format outlined in this section:

1. Proposal Cover Sheet (Attachment 5)
2. Applicant or Firm Name
3. Firm Qualifications
  - a. Type of organization, size, professional registration and affiliations. Proposals shall also include an Organizational Chart (create attachment and identify as Attachment 6)
  - b. Names and qualifications of personnel to be assigned to this project (submit with proposal and identify as Attachment 7).
  - c. Outline of recent projects completed that are directly related to this project. Proposer is required to demonstrate specific design and project expertise relating to the requirements of the Project Scope.
  - d. Qualifications of consultants, subcontractors, or joint venture firm, if appropriate.
  - e. Contracting experience (Attachment 8) indicating previous and current contracts in effect. Agencies listed may be contacted as references.
  - f. Review and submit signed Assurances form (Attachment 9)
4. Understanding of and Approach to the Project
  - a. Detailed understanding of approach to be taken to services outlined in the **Project Scope** section described below in this document, including:
    - Understanding of Local Need



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- Specific service delivery strategies
  - Experience and competencies with targeted populations
  - Attachment 10 Planned Performance (form included)
- b. Detailed understanding of approach to be taken to meet obligations as outlined in the **Budget** section described below in this document, including:
- Leveraged Resources (Attachment 4)
  - Line item budget (Attachment 11) **and**
  - Budget Narrative (create and include with Attachment 11)
  - Attachment 12, Cost Effectiveness Measurement
- c. Indication of information and participation the proposer will require from County staff.
- d. Indication of time frame necessary to complete the plan review once a Notice to Proceed is issued.

5. Fees and Insurance

- a. Propose total fixed fees to complete project as described under Project Scope.
- b. The selected Consultant will be required to provide insurance coverage in the amount of \$1,000,000 General Liability Insurance and \$1,000,000 of Professional Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.
- c. The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County.
- d. See Appendix A – Sample County Contract for complete insurance and indemnification requirements.

**Workforce Investment Act, America's Job Center of California Operator Services****PROJECT SCOPE****WIOA America's Job Center of California (AJCC) Operator Services Overview**

In order to maintain the WIB's implementation of an integrated and functionally aligned AJCC one-stop system in San Luis Obispo County, this RFP seeks proposals that directly address the below principles as they relate to the AJCC one-stop system.

The selected Operator will be responsible for staffing all services necessary to carry out the duties required to operate and/or manage the following: WIOA Adult and Dislocated Worker programs; employer services, performance management, and utilization of the State CalJOBS system.

**1. Operator**

This RFP is seeking an Operator to successfully further the implementation of a complete and functionally aligned AJCC system while meeting all outcome targets established by the DOL, California Employment Development Department (EDD), and the SLO WIB. The Operator will be responsible for the operational management of the America's Job Center of California site and WIOA programs, performance management, process improvement, performance analysis, integration, additional funds implementation, and job seeker and employer services to include innovative training strategies in response to employer needs.

Under the Operator model, a lead agency will work with partner agencies to provide guidance and direction in the implementation of innovative services to meet the needs of the job seeker, employer, and entire AJCC system. Through the provision of Adult services under WIOA, the Employment Development Department (EDD) will be a required co-located partner. Operator responsibilities and decisions include program design, use of funds, and implementation of new programs, hours of operation, work space for staff, delivery of WIOA services to AJCC customers, linkages with business services providers, dispute resolution, etc. It is the responsibility of the Operator to design the partnership agreements that outline each partner's responsibility including how specific tasks will be completed, coordinated and managed. Required tasks include coordinating all Resource/Cost Sharing Agreements with the facility's leaseholder, as well as with all partners within the center; program management; service delivery; program specific policies and business practices; performance management, process analysis and improvement; MIS protocols and practices; staffing and staff training; and inventory management.

**2. AJCC one-stop system goals**

In order to maintain a functionally aligned AJCC site, agencies responding to this RFP must commit to developing shared program goals and processes including the continued implementation of an Integrated Service Delivery (ISD) model. The creation of shared outcome goals will help every staff person in the AJCC site take responsibility/ownership of every job seeker and employer customer. Multiple programs share the goal of serving the same population, and WIOA and Wagner Peyser/EDD programs share the same performance measures. The Operator will be responsible for the creation and implementation of shared goals as well as presenting these goals at bi-monthly AJCC one-stop system leadership meetings. WIB staff will assist the Operator with the creation of these goals as needed.

### 3. Focus on Employer – Job Seeker Connection

SLO WIB strategic initiatives, in line with WIOA, include an emphasis on engaging employers across the workforce system to align training with needed skills and match employers with qualified workers. With the local unemployment rate on the decline, forming the connection between specific employer needs and job-seeker training will be imperative to meeting the changing needs of the local workforce. In support of this approach, WIOA adds flexibility at the local level to provide incumbent worker training and transitional jobs as allowable activities and promotes work-based training (i.e. on-the-job trainings/OJTs). Training that leads to industry recognized post-secondary credentials are also a focus to best prepare job-seekers for sustainable career pathways.

### 4. Partnerships with Educational Institutions

The SLO WIB believes that education and training is integral to successful job placement, self-sufficiency, and the economic vitality of our region. Recent changes to the State's Eligible Training Provider List (ETPL) have significantly limited training options; therefore new and innovative staffing solutions and relationships are needed to adequately meet the training needs of employers and job seekers. Bidders to this RFP are required to work with educational providers to explore solutions that meet these needs. Partnerships may vary with each institution and may include co-located staff, a variety of classes and trainings offered at the AJCC site or a college campus, financial aid assistance and education, and any other arrangement that will further the relationship between the AJCC one-stop system and educational institutions. Robust linkages to workforce education will result in the leveraging of multiple assets and the creation and utilization of products and services that accelerate skill development and benefit our jobs seekers and employers.

### 5. Management Information System (MIS)

MIS activity will be conducted in CalJOBS, the State's MIS system. The Administrative Entity's MIS staff will provide initial, new-staff orientation and training as well as ongoing technical assistance, training to specific identified needs, and oversight of the CalJOBS system, it is also the responsibility of the Operator to ensure that case management and employer services staff and AJCC partners are *proficient* in CalJOBS.

### 6. Employer Services

- Developing a comprehensive strategy for the provision of innovative, high quality services to employers in our community.
- Referral of qualified, job-ready candidates for job openings who have been screened to the criteria and standards specified by the employer.
- Retention services, including work-site assistance.
- Human resources planning tools and assistance, including tax credit information.
- Services that address the needs of small and large businesses for entry level through highly skilled professional/technical workers.
- Job recruitment assistance.
- Services such as specific job skill/ability testing, drug testing and background checks on a fee-for-service basis.
- Identifying funding for and setting up on-the-job training, customized training, incumbent worker training, and English as a Second Language (ESL) and literacy programs for new and incumbent workers, with an emphasis on work-site programs.

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It is the responsibility of the Operator to design how site operations will be carried out at the AJCC site. The only staffing stipulation is that individuals responsible for direct program and/or site management must be located in the center for which they are responsible. Duties associated with site operations may include but are not limited to the following:

- Implementation and management of services under guidelines and rules established by the County, EDD, and DOL;
- Providing leadership within a center especially around effective use of infrastructure, partnership issues, growth, and delivery of services;
- Functionally integrate system partners and continue the vision of functional integration;
- Monitor customer service levels;
- Develop and/or coordinate Resource/Cost Sharing Agreements with the facility leaseholder as well as with all partners within the center;
- Work with SLO WIB staff and other organizations to provide guidance and leadership to the AJCC system and operationalize the vision of SLO WIB for San Luis Obispo County;
- Assist in the development and execution of a Memorandum of Understanding (MOU) among AJCC one-stop system partners;
- Become knowledgeable with the mission and performance standards of all partners and facilitate cross-training among all staff;
- Manage the provision of career services
- Manage fiscal functions (resource/cost sharing and allocation) for the site;
- Manage the physical property of the AJCC site(s);
- Evaluate customer needs and satisfaction data to continually refine and improve service strategies;
- Act as liaison between the County and the AJCC partnership and ensure that the WIB's policies and procedures are effectively communicated and carried out;
- Recruit additional partners;
- Define and provide means to meet common operational needs, such as training, technical assistance, additional resources, etc;
- Facilitate the sharing and reporting of data, including managing any resulting data sharing agreements;
- Ensure EEO requirements are met;
- A variety of other duties necessary to coordinate the day-to-day operations and long term viability of the site;

Note: Neither the County nor the SLO WIB are responsible for the AJCC site leases. Proposals should include a brief plan for the leasing, justification /documented need for site location/relocation of the center, transition process, and community engagement strategy. Facility costs may not exceed 25% of budgeted funds. Detailed plans for the site and transition process will be required as part of the contract negotiation process with the selected proposer.

**8. Workforce Innovation and Opportunity Act Program Services, Eligibility and Performance**

It is the responsibility of the Operator to design how the program operations duties will be carried out at the AJCC site. The only staffing stipulation is that individuals responsible for direct program and/or

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site management must be located in the center for which they are responsible. At a minimum, the following programs and services must be available to participants:

A. Adult and Dislocated Worker Program Services

a) Career Services available to all Adults and Dislocated workers include but are not limited to the following:

- Determination of eligibility to receive additional services (beyond WIOA Career services);
- Outreach, intake and orientation to the information and other services available through the AJCC system ;
- Initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities, and supportive service needs;
- Job search and placement assistance, and where appropriate, career counseling;
- Information on in-demand industry sectors and occupations and nontraditional employment;
- Appropriate recruitment and other business services on behalf of employers in the local area (services may include providing information and referral to specialized business services not traditionally offered through the AJCC system);
- Referrals to and coordination of activities with other programs and services, including programs and services within the AJCC system and, in appropriate cases, other workforce development programs;
- Employment statistics information relating to local, regional, and national labor market areas, including job vacancy listings, information on job skills necessary for these positions, and information relating to local occupations in demand and the earnings and skill requirements for these occupations;
- Performance history and program cost of eligible providers of training services; Consumer information regarding local performance, supportive services, how to file unemployment compensation claims and apply for financial aid assistance for training and education;
- Assistance in applying for programs of financial aid assistance for training and education programs not funded through WIOA;
- In-depth interviewing, evaluation and assessment including the development of an individual employment plan to identify goals to achieving employment;
- Group and individual counseling, career planning and short-term prevocational skills;
- Internships and work experiences that are linked to careers;
- Financial literacy services;
- Supportive services such as child care, transportation, and work and training related expenses;
- Out-of-area job search assistance and relocation;
- English language acquisition and integrated education and training programs;
- Follow-up services, including counseling regarding the workplace, for participants in WIOA activities who are placed in unsubsidized employment, for not less than 12 months after the first day of the employment, as appropriate.

b) Training Services for eligible individuals are provided through Individual Training Accounts (ITA) vouchers that can be used at any eligible training provider.

Training services may include:

- Occupational skills training

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- On-the-Job Training (OJT);
- Incumbent worker training
- Programs that combine workplace training with related instruction, including cooperative education programs
- Training programs operated by the private sector;
- Skills upgrading and retraining;
- Entrepreneurial training;
- Transitional jobs
- Job readiness training provided in combination with other training services
- Adult education and literacy activities provided in combination with other training services;
- Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training;

Priority shall be given to training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area.

WIOA requires improved coordination between employment and training activities for individuals with disabilities by promoting physical and programmatic accessibility to these services.

Supportive Services are intended to enable an Adult or Dislocated Worker engaged in WIOA services to participate in program activities and to secure and retain employment (Note: supportive services costs do not count towards the aforementioned requirement to fund training at a specified percentage).

**B. Adult and Dislocated Worker Program Eligibility**

- a) An Adult program participant is defined as an individual who at the time of application:
- Is not less than 18 years of age; and
  - Has authorization to work in the United States
  - For males born after December 31, 1959, registered for Selective Service.

Priorities for Service:

- First priority shall be given to recipients of public assistance or other low-income individuals. Veterans or other covered persons who are recipients of public assistance and low-income veterans shall be given first priority among this group.
  - Second priority of service shall be given to veterans and/or spouses of certain veterans for intensive services and training services.
- b) Dislocated Workers are 18 years and older meeting the adult criteria above and:
- Recently lost a job through no fault of their own and are unlikely to return to their previous occupation or industry.
  - Are about to be laid off due to a plant closure or mass layoff.
  - Are formerly self-employed but now unemployed because of general economic conditions or natural disaster.
  - Meet the definition of a displaced homemaker. Displaced homemakers are equally eligible for Dislocated Worker Services if they have been dependent on the income of a family member

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but are no longer supported by that income and if they are experiencing difficulty obtaining or retaining employment.

- Is an eligible Dislocated Worker (as defined above) who since dislocation and prior to application has not been employed in a job that paid a wage leading to self-sufficiency.

C. Adult and Dislocated Worker Program Performance

Performance accountability provisions under WIOA will not take effect until July 01, 2016. However, it is the expectation of the SLO WIB that AJCC providers, along with guidance from the Administrative Entity for the WIB and per State and Federal guidance, will begin to implement, in the 2015-16 program year, service strategies and measures which support the achievement of the six primary performance indicators established under WIOA for Adult and Dislocated Workers. These indicators are:

1. Percentage of program participants who are in unsubsidized employment during second quarter after exit from the program
2. Percentage of program participants who are in unsubsidized employment during the fourth quarter after exit from the program.
3. Median earnings of program participants who are in unsubsidized employment during second quarter after exit.
4. Percentage of program participants who obtain a recognized postsecondary credential or a secondary school diploma or its recognized equivalent, during participation in or within 1 year after exit from the program.
5. Percentage of program participants who, during a program year, are in an education or training program that leads to a recognized postsecondary credential or employment and who are achieving measurable skill gains toward such a credential or employment
6. Indicators of effectiveness in serving employers.

*(Prior to second full program year after date of bill enactment, Secretary and representatives shall establish one or more primary indicators of effectiveness of core programs in serving employers)*

For program year (PY) 2015-16, WIA performance measures, outlined in the table below, will remain in effect. All funded contractors will be held accountable for meeting these performance measures. The Department of Labor (DOL) sets standards and minimum levels along with the State of California. The County will not receive final performance rates for PY 2015-16 until after proposals are received. Performance rates shown below are estimates based on PY 2014-15 WIA performance rates.

| Performance Measures      | Performance Rates |
|---------------------------|-------------------|
| <b>Adult</b>              |                   |
| Entered Employment Rate   | 72.5%             |
| Retention Rate            | 82%               |
| Average Earnings          | \$13,200          |
| <b>Dislocated Workers</b> |                   |
| Entered Employment Rate   | 79%               |
| Retention Rate            | 88%               |
| Average Earnings          | \$16,400          |

Proposers must complete Attachment 10 - Planned Performance, indicating anticipated numbers in performance measures categories in the Adult and Dislocated Worker funding streams.

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**BUDGET**

The table below provides an *estimated* breakdown of WIOA Adult and Dislocated Worker funds available for service contracts for the period July 1, 2015 through June 30, 2016.

The County has set a target of a minimum of 25% of WIOA funds on participant services. These services include training (classroom, on-the-job, incumbent, and customized), work experience wages, internships, supportive services, and other participant-related activities. The County will consider in-kind contributions from non-WIA/WIOA funding sources when making programmatic funding decisions. Furthermore, a minimum of \$120,160 (representing 15% of the LWIA's *anticipated* formula allocations – note these training percentage obligations are of State allocation to the local area *not* a percentage of contract funding) and perhaps as much as \$200,266 (representing 25% of the LWIA's *anticipated* formula allocation) is to be directed to training for Adults and Dislocated Workers in compliance with SB-734. Proposers may direct only 15% provided that they make up the difference (\$80,106) with leveraged funding. Beginning July 2016 (program year 2016-17) SB-734 minimum training expenditure requirement will increase to 30%. SB-734 identifies those activities that count as training as well as acceptable/allowable sources of leverage. When determining overall funding investments, the County will consider how potential service providers are successfully using alternative funding sources to complement WIA/WIOA activities. Further details regarding our local implementation of SB-734 can be found in local policy 39-08, Training Expenditure Requirements, available on the SLO WIB website at [sloworkforce.com](http://sloworkforce.com) under the Staff Resources Tab.

All necessary program services and operation costs including site operations and employer and job seeker services for the period of July 1, 2015– June 30, 2016 will be paid using the program funds listed below. Bidders should ensure that the grand total of their proposals does not exceed the total amounts available.

**PY 2015-2016 ESTIMATED WIA/WIOA PROGRAM FUNDING ALLOCATIONS**

| <b>Program Services and Operations, Site Operations,<br/>and Employer Services</b> | <b>WIA/WIOA</b>  |
|--|------------------|
| Adult Funds  | \$365,000        |
| Dislocated Worker Funds  | \$435,000        |
| <b>TOTAL</b>   | <b>\$800,000</b> |

Proposers must complete Attachment 11 (WIA/WIOA Services Budget) line item budget form and include a budget narrative that corresponds to its line-item detail. This narrative should justify the need for all costs built into the line-item detail, the methodology used to derive each cost, and the methodology used to allocate line-item costs. In the narrative describe:

- How the project's proposed budget supports the stated objectives and activities in the project;
- How funds are allocated to minimize administrative and overhead costs and to maximize direct services to participants;
- The duties of project-funded staff necessary to the job assignment;
- How project-funded staff duties and time commitments support the proposed objectives and activities;
- Identify all proposed subcontracts;
- Identify a cost per enrollment for each fund stream to facilitate scaling up or down proposed



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services based on final allocations; and

- Provide an overview of the percentages of funding allocated to the following:
  - Participant Services (training and supportive services)
  - Personnel
  - Administration
  - Indirect Cost Rate
  - Operations
  - Facility costs (a part of operations)

Proposers must also complete Attachment 12 - Cost Effectiveness Measurement, indicating the proposed cost per customer and variation in cost for carry-in customers (currently enrolled customers) vs. newly enrolled customers. As outreach, recruitment, eligibility determination/application, etc. are involved in the process of enrolling new customers, it would be expected that the cost for serving an individual already in the system (carry-in customer) be lower than the cost per finding, assessing and enrolling a new customer.

**RFP ATTACHMENTS**

|               |   |
|---------------|---|
| Appendix A    | Sample County Contract  |
| Appendix B    | Sample WIA Contract Certifications and Assurances                                 |
| Attachment 1  | Proposal Checklist (form included)  |
| Attachment 2  | Evaluation Criteria (form included)   |
| Attachment 3  | Ex Parte Communication Prohibition and Conflict of Interest (form included)       |
| Attachment 4  | Leveraged Resources (form included)   |
| Attachment 5  | Proposal Cover Sheet (form included)  |
| Attachment 6  | Organizational Chart (create attachment and identify as Attachment 6)             |
| Attachment 7  | Names/Resumes of Personnel (create attachment and identify as Attachment 7)       |
| Attachment 8  | Contracting Experience (form included)  |
| Attachment 9  | Assurances (form included)  |
| Attachment 10 | Planned Performance (form included)   |
| Attachment 11 | Budget (form included) & Budget Narrative (create and include with Attachment 11) |
| Attachment 12 | Cost Effectiveness Measurement  |