



Region 1

Request for Proposals

To

Provide Services Under the Workforce Investment Act

Bidding Area 1: Services of WorkOne Centers for Northwest Indiana

Bidding Area 2: Youth Programming and Services

**Services to be Delivered During
September 1, 2011– June 30, 2012**

RFP Issue Date: June 7, 2011

Key Dates:

Mandatory Letter of Intent Due: June 13, 2011
Additional Questions Due: June 13, 2011
Mandatory Bidders Conference: June 14, 2011 at CWI (10:00 – 11:30 a.m.)
Proposal Due Date: June 30, 2011
Administrative Review: July 5, 2011
Organization Interviews: July 6, 2011
Award Announced: Week of July 25th, 2011
Mandatory Contractors Meeting: August 4, 2011 at CWI (9:00 – 10:30 a.m.)
Contract Begins: September 1, 2011

Table of Contents

- I. Background & General Information
- II. Characteristics of Successful Bidder (s)
- III. Rights and Assurances
- IV. RFP Process
- V. Proposal Narrative
 - A. Organization Description, Characteristics, & Qualifications
 - B. Performance History
 - C. Partnership Coordination & Integration
 - D. Plan of Service
 - a. Bidding Area 1: Center Management
 - b. Bidding Area 2: Youth Programming
 - E. Management Plan
 - F. Transition Activities
 - G. Financial Management and Costs
- VI. Proposal Requirements
- VII. Cover Sheet and Attachments
 - A. Attachment A - Proposal Cover Sheet and Summary
 - B. Attachment B-1 – Itemized Budget
 - C. Attachment C – Youth Programming Planning Levels
 - D. Attachment D - Non-Collusion Affidavit
 - E. Attachment E - Assurances & Certifications
 - F. Attachment F – Letter of Intent Form
- VIII. Glossary of Terminology
- XI. Functional Job Descriptions

I. Background and General Information

The Center of Workforce Innovations, Inc. is a 501(c)(3) organization contracted by the Northwest Indiana Workforce Board (NWIWB) to serve as staff to the Board and the One Stop Operator in Economic Growth Region 1 (EGR 1) and as such is responsible for the administration and oversight of employment and training services within EGR 1. EGR 1 is located in Northwest Indiana and consists of Jasper, Lake, La Porte, Newton, Porter, Pulaski, and Starke counties. The Region 1 website may be visited at <http://nwi.gotoworkone.com/home/index.asp>.

The Indiana Department of Workforce Development has mandated that employment and training services throughout Indiana be delivered through an integrated service delivery system. For more information regarding the integrated service delivery system please review Indiana's policy 2010-13, WorkOne Customer Flow Policy located at <http://www.in.gov/dwd/2544.htm>.

At the direction of the NWIWB, the Center of Workforce Innovations is issuing this Request for Proposal (RFP) to procure employment and training services in WorkOne Centers on behalf of the NWIWB. The One Stop Operator intends to be as inclusive as possible in this solicitation. The goal is to receive a wide variety of high quality, innovative proposals that meet the workforce development needs of the region. Traditionally, these services have been referenced as Adult, Dislocated Worker, and Youth services; however, as a result of the integrated system, the services being sought under this RFP differ in content and role as those services subcontracted in the past. This RFP contains two distinct bidding areas (WorkOne Center Management and Youth Services). An organization can bid on both bidding areas or just one bidding area. If bidding on area 1 (WorkOne Services and Center Management) the bidder must bid on all WorkOne sites in the Region. Due to reduced funding and the need for improved efficiencies, it is anticipated that up to two service providers total, except for the youth category will be awarded contracts. For youth programming and services NWIWB and the One Stop Operator are reserving the right to contract out separately the urban JAG component.

In the integrated service delivery model, all services are delivered by functional teams that are comprised of individuals from a variety of funding streams and organizations. Team activities and workload are coordinated by a functional supervisor known as the Center Manager. The functional teams are as follows: Resources, Career Advising, and Business Services Teams. All staff performs his/her job tasks in a specific functional area. In this setting, neither job titles nor organizational boundaries are used to differentiate staff from one organization to another. EGR 1 supports the philosophy that all workforce services must be a formal and on-going strategy for both business customers and job seeker customers. Therefore, the One Stop Operator functionally supervises the Business Services Team. The Business Services Team consists of Business Services Representatives

who implement an industry cluster approach to serving businesses across the Region.

This integrated service strategy has been set by the One Stop Operator and implemented by the Regional Leadership Team. Continuous improvement is the responsibility of both the One Stop Operator and Leadership Team. (See the glossary for the definition of Leadership Team). At least one of key management staff(s) from the successful bidder(s) is expected to be co-located at the office of the One Stop Operator. These staff(s) may be functionally supervised by the One Stop Operator.

There are twelve WorkOne Centers in Economic Growth Region 1. The Centers are located in Crown Point, East Chicago, Gary, Hammond, Knox, La Porte, Michigan City, Morocco, Portage, Rensselaer, Valparaiso, and Winamac. Organizations have the opportunity to bid on all 12 WorkOne Center(s) as developed through EGR 1's Integration plan. The following are the duties involved with delivering services in a WorkOne center:

- Overall Center Management
- Coordination with partner organizations
- Oversight and coordination of services
- Marketing, outreach, and customer recruitment in coordination with the One Stop Operator of WorkOne services
- Successful performance goals and outcomes
- Tracking and reporting
- Coordination with Management Information System (MIS) staff to provide quality control, including accuracy and validity oversight, for all data gathered at Centers, for state and local databases (MIS Staff may be part of an organization's management staff)
- Coordination with IT unit to service Centers throughout the Region (IT staff may be part of an organization's management staff)
- Coordination of business services with the Business Services Manager who functionally supervises the business services team
- Coordination with Communications Manager to insure consistency in outreach and marketing materials as well as development of success stories
- Development and maintenance of required number of Access Points
- Compliance with and communication of required policies
- Coordination of Center services with the Regional WorkOne Manager
- Active participation in the Regional Leadership Team.

Organizations can also bid on providing Youth Services throughout the Region. Youth services can be provided for youth ages 14 – 21. The Workforce Investment Act defines younger youth as those aged 14-18, older youth as those aged 19-21, in-school youth as those youth enrolled into some type of secondary or post secondary

education, and out-of-school youth as those youth not enrolled in any type of secondary or post-secondary institution.

Northwest Indiana - Region 1 utilizes the Jobs for America’s Graduates (JAG) Program as the preferred model to serve in-school and out of school youth across the region. Below is a listing of existing JAG Programs in Northwest Indiana. The expectation is that these programs would remain in place and functioning under this RFP. For information on the required elements of a JAG program please go to this site: <http://www.jag.org>.

Northwest Indiana – Region One JAG Programs:

- In-School JAG - Gary, Indiana: Lew Wallace High School (2 programs), West Side High School, Theodore Roosevelt High School
- In-School JAG – Hammond, Indiana: Hammond High School
- In-School JAG – East Chicago, Indiana: East Chicago Central High School
- Out-of School JAG – Gary, Indiana: Gary WorkOne (2 programs)

While performance measures are designated for younger and older youth, costs for services are designated for in-school and out-of-school youth. Funds for youth services will be distributed at 65 percent for in-school youth and 35 percent for out-of school youth.

See the chart below as well as the glossary for further clarification:

Bidding Area	Focus
Operation of WorkOne Center (Center Management)	<ul style="list-style-type: none"> ▪ Manage all day to day activity of the Center including work flow, paper flow to reporting agency, facilitation of weekly staff meetings, customer service standards, and performance standards
	<ul style="list-style-type: none"> ▪ Make staffing decisions including assisting with new hires, determining staffing levels, transferring staff to other Centers
	<ul style="list-style-type: none"> ▪ Responsible for all facilities management
	<ul style="list-style-type: none"> ▪ Participate as a member on the Leadership Team
	<ul style="list-style-type: none"> ▪ Determine training needs for staff and insure training is conducted
	<ul style="list-style-type: none"> ▪ Evaluate staff under formal and functional supervision
	<ul style="list-style-type: none"> ▪ Welcoming customers who enter the WorkOne office

	<ul style="list-style-type: none"> ▪ Assessing and determining customer needs
	<ul style="list-style-type: none"> ▪ Referring customers to resources in the community
	<ul style="list-style-type: none"> ▪ Enrolling customers into programs including Wagner-Peyser, Veterans, Workforce Investment Act, and Trade Readjustment Act.
	<ul style="list-style-type: none"> ▪ Review customer assessments, work history, and education in order to develop an academic and career plan
	<ul style="list-style-type: none"> ▪ Schedule customers for ongoing activities within the WorkOne Centers for workforce preparedness
	<ul style="list-style-type: none"> ▪ Case Manage and provide employment counseling to job seekers through placement and retention
	<ul style="list-style-type: none"> ▪ Managing the funding for individuals who enter into Pre-vocational training, Occupational training programs, Work Experiences, or On the Job Training.
	<ul style="list-style-type: none"> ▪ Secure and integrate locations known as access points to provide WorkOne services to target populations
	<ul style="list-style-type: none"> ▪ Review data collection and input for quality, accuracy, and conformance to policies and regulations
	<ul style="list-style-type: none"> ▪ Serve as the Indiana Client Connect field level help desk
	<ul style="list-style-type: none"> ▪ Orient and train new staff (or retrain existing staff) on rules, processes and procedures in collaboration with the One Stop Operator
	<ul style="list-style-type: none"> ▪ Serves as the key liaison and assistance between field operations and One Stop Operator MIS department/Master/Elite User
	<ul style="list-style-type: none"> ▪ Provide troubleshooting and repair services for IT ticket assignments within the Regional System
	<ul style="list-style-type: none"> ▪ Provide software and hardware repair, services, and set up based on ticket assignments
	<ul style="list-style-type: none"> ▪ Track IT tickets and support the work of the IT Manager to facilitate day to day and Projects
	<ul style="list-style-type: none"> ▪ Work with the Business Services Team to provide services to employers such as employee screening and recruitment, employee assessment, and training
	<ul style="list-style-type: none"> ▪ Input and fill job orders in the Indiana labor exchange database known as Indiana Career Connect

	<ul style="list-style-type: none"> ▪ Refer and place job ready customers to job openings
	<ul style="list-style-type: none"> ▪ Create a culture of customer engagement resulting in performance and placement
	<ul style="list-style-type: none"> ▪ Provide follow up for customers who have accessed WorkOne services
	<ul style="list-style-type: none"> ▪ Work in conjunction with Communications Manager for marketing of WorkOne services as well as provide success stories on customers
Youth Programming	<ul style="list-style-type: none"> ▪ Assess youth for appropriateness for the Workforce Investment Act program
	<ul style="list-style-type: none"> ▪ Determine eligibility of youth participants
	<ul style="list-style-type: none"> ▪ Provide services or access to the 10 youth program elements through proven programs
	<ul style="list-style-type: none"> ▪ Create a culture of customer engagement resulting in performance and placement
	<ul style="list-style-type: none"> ▪ Implement and manage to performance the JAG program model for in-school and out-of school youth
	<ul style="list-style-type: none"> ▪ Provide follow up for youth who have participated in services

II. Characteristics of Successful Bidder (s)

The Board is seeking qualified entities to provide innovative high quality integrated services. Organizations making application must demonstrate experience and expertise in the characteristics listed below:

- Achievement in customer engagement
- Achievement in career advising and case management of job seekers resulting in employment
- Customer service oriented staff and leadership
- Achievement of performance related goals
- High quality data management and demonstrated data integrity
- Competent management with results driven vision
- Cooperative management and staff
- Collaboration with partners on projects and/or programs with successful shared results
- Ability to align staffing and leadership with Northwest Indiana Workforce Board vision
- Flexibility and ability to adapt to change with minimal disruption in service
- Creativity and innovation

The resulting contract(s) with the successful bidder(s) will be for a ten month period, September 1, 2011 to June 30, 2012. Based on performance, the contract may be renewed up to two additional years, July 1, 2012 to June 30, 2014. The form of the contract will be cost-reimbursement.

By contracting with the One Stop Operator, organizations that receive Workforce Investment Act Funds are acknowledging their role in the regional achievement of Common Measures. Each organization holds crucial pieces of the process which move the region to successful Common Measures performance. At contracting, each organization's performance targets by service area will be given and incorporated into the contract. It is expected that performance targets are met as outlined in the contract. Reports to the One Stop Operator are required.

The successful bidder(s) will provide services in all of the office locations effective on or after September 1, 2011. Under the guidance of the One Stop Operator the successful bidder(s) must coordinate services and operations with partners in the WorkOne centers to ensure a smooth and seamless transition. The goal of the process is to serve customers continuously and effectively with the least possible disruption. Management staff from the successful bidder(s) is expected to be co-located at the office of the One Stop Operator. These staff will be functionally supervised by the One Stop Operator.

III. Rights and Assurances

The One Stop Operator reserves the right to reject portions or the entirety of any or all proposals received or to award, without discussions or clarifications, a contract on the basis of initial proposals received, if that is deemed to serve the best interests of the Board and Region 1. Further the One Stop Operator reserves the right to conduct discussions, either oral or written, with those respondents determined to be reasonably viable candidates for award. If discussions are held, best and final offers may be requested. Successful bidder(s) may be asked to further negotiate their proposal before the One Stop Operator will make any final commitment.

Therefore, each proposal should contain the respondent's best terms from a price and technical standpoint. The One Stop Operator also reserves the right to reopen discussions after receipt of best and final offers if it is deemed to serve the best interests of the Board and Region 1.

This Request for Proposals is not in itself an offer of work nor does it commit the One Stop Operator to fund any proposals submitted. The One Stop Operator is not liable for any costs incurred in the preparation or research of proposals.

All commitments made by the One Stop Operator are contingent upon the availability of funds and the One Stop Operator reserves the right to award an amount less than the total funds available for bid contained in this RFP.

The One Stop Operator assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Investment Act of 1998 (WIA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participate in any WIA Title 1-financially assisted program or activity;
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the bases of race, color and national origin; Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination on the basis of age; and
- Title IX of the Education Amendment of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.

The One Stop Operator also assures that it will comply with 29 CFR part 37 and all other regulations implementing the laws listed above. This assurance applies to the One Stop Operator's operation of the WIA Title 1-financially assisted program or activity, and to all agreements the grant applicant makes to carry out the WIA Title 1-financially assisted program or activity. The One Stop Operator understands that the United States has the right to seek judicial enforcement of the assurance. This WIA Title I funded program is an equal opportunity employer/program. Auxiliary aids and services will be made available upon request for individuals with disabilities. By submitting a bid all bidders are providing an assurance that they will comply with the above nondiscrimination and equal opportunity provisions.

The One Stop Operator is exempt from federal, state and local taxes and will not be responsible for any taxes levied on the respondent resulting from the contract based on this RFP.

The specifications in this RFP may change based on issuance of State or Federal policy, SWIC, or WIA re-authorization. The Board will work with the successful bidder(s) to implement any changes required by the State or Department of Labor. By submitting a proposal, the bidder(s) agrees to work cooperatively with the One Stop Operator to comply with subsequent changes.

By submitting a proposal the bidder certifies to his/her knowledge and belief that there is no conflict of interest (real or apparent) inherent in the bid or in delivering the plan of work if the One Stop Operator awards a contract. A conflict of interest would arise if any individual involved in the preparation of this RFP, proposal review and rating or award decisions has a financial or other interest in or represents the bidding organization and would be likely to gain financially or personally from the award of a contract. The same would hold true for any member of the individual's family, partner, or an organization employing or about to employ any of the above as a direct result of the successful award of a contract under the

RFP. The One Stop Operator reserves the right to disqualify a bid should a conflict of interest be discovered during the solicitation process.

By submitting a proposal the bidder assures that it will provide additional services as requested under additional grants such as a TAA, National Emergency Grant, or other State funded workforce program granted to the Northwest Indiana Regional Workforce Area.

The bidder(s) assures that if awarded a contract by the One Stop Operator, it will comply with Regional, State and Federal program and financial regulations, policies and directives, as well as comply with any and all monitoring requirements.

While we recognize that an individual organization holds the right to hire, the NWIWB expects that existing staff in the One Stop system will have first consideration in the hiring process for staff. By responding to this RFP the bidder(s) assures that it committed to this NWIWB expectation.

IV. RFP Process

On May 16, 2011, the RFP will be released for bids. Below is a list of key deadlines and requirements related to the RFP:

Date	Time	Requirements of RFP Process
June 13, 2011	4:00 pm Central Standard Time	Mandatory letter of Intent to bid. Organizations must use the form letter attached to this proposal.
June 13, 2011	4:00 pm Central Standard Time	Last date to submit questions regarding this RFP. Questions will be accepted only if sent electronically, by fax, or mail to the contact person listed.
June 14, 2011	10:00 am Central Standard Time at CWI office in Valparaiso, In	Mandatory Bidders Conference
July 5, 2011	3:30 pm Central Standard Time	Complete proposals submitted. This includes hard copy and electronic versions. <i>Proposals submitted after 4:00 will not be accepted.</i>
July 6, 2011	4:00 pm. Central Standard Time	Administrative Review Completed

July 11, 2011	8:00 - 1:00 pm. Central Standard Time	Interviews with organizations selected for final consideration for funding.
Week of July 25, 2011		Award Announcement
August 4, 2011	9:00 – 10:30 a.m. Central Standard Time	Mandatory contractors meeting
September 1, 2011	N/A	Contract Begins

V. Proposal Narrative (All Bidders Complete Sections A, B, & C)

A. Organization Description, Characteristics, & Qualifications *(Proposal Evaluation 5 points - Page Limit – 2 pages)*

1. Organization Description: Provide an overview of your organization. Be sure to address major programs currently offered, any other business activities you are engaged in, and the legal status of your organization.
2. Organizational Leadership: Outline the organization’s expertise and experience in successful program management and leadership. Please include brief bios of key organization leaders
3. Organization Characteristics & Qualifications: Describe the strengths and innovations of your organization’s process and measurement for successfully delivering customer engagement and services (such as career advising and case management of job seekers).
4. Point of Contact within the Organization: Identify the person who will be the single point of contact with the One Stop Operator and Fiscal Agent for this contract along with his/her contact information.
5. Required exhibits and attachments for this section which do not count toward the page limit:
 - Current Organizational Chart which clearly depicts lines of responsibility and authority
 - Most Recent Business Entity Filing
 - List of References* - Provide no **more than five** references complete with address, voice, e-mail and fax *We will not accept as references individuals on the Regional Workforce Board, the Center of Workforce Innovations Board and staff, the Local Elected Official Board, or Department of Workforce Development employees.
 - A signed corporation resolution(s) which:
 - Authorizes the submission of the proposal.

- Authorizes the signatory on this proposal to sign the proposal, negotiate on behalf of the corporation and bind the corporation
- A list of current board members and a list of board meeting dates for the next fiscal year.
- Attachment D (Non-Collusion Affidavit)
- Attachment E (Assurances and Certifications)

B. Performance History *(Proposal Evaluation 25 points – page limit -2 pages)*

Describe the organization’s experience serving individuals seeking assistance with workforce development needs and your success in job placement and retention services. Be sure to address the bidding area you are responding to (WorkOne Centers and/or Youth). Outline **all** workforce related programs (including Wagner Peyser, WIA, TAA, or similar) operated during the last two years by funding source, amount, target population, brief program description, performance metrics/goals/targets with related actual performance results as required in contracts for the past two years.

If your organization does not have existing workforce related performance experience, please address performance history from the perspective of existing work or contracts. Outline all programs operated during the last two years by funding source, amount, brief program description, performance metrics/goals/targets as outlined in contracts and the performance results for the past two years.

C. Partnerships, Coordination & Integration *(Proposal Evaluation 10 points – page limit -2 pages)*

1. Partnerships: Describe the partnerships your organization sees as necessary to this proposal. Be sure to identify any existing partnerships by area or location. How will you develop or sustain effective working relationships with these partners? How will the partnerships directly impact successful performance?
2. Coordination: Describe how organization staff will work in cooperation with the One Stop Operator to ensure coordinated management and integration of WorkOne service delivery staff and services including functional alignment of staff in order to achieve exceptional customer service and customer engagement. What will you need from the One Stop Operator to be successful?
3. Integration: Northwest Indiana - Region 1 is responsible for common performance measures based on multiple funding streams. Describe how your organization will work with staff from all funding streams to achieve these outcomes. (For more information on Common Measures please see the glossary.)

4. Required exhibits for this section which do not count toward the page limit:
 - Partnership matrix by county demonstrating effective relationships you have currently in place and any other partners or organizations you plan future collaborations

Bidding Area 1: Operation and Services of WorkOne Center/s
(Only complete this section if you are bidding on Area 1: Operation and Services of WorkOne Centers. If not bidding on Area 1, please proceed to bidding Area 2: Youth Programming.)

D. Plan of Service (*Proposal Evaluation 20 points - Page Limit – 15 pages*)

1. **Implementation:** Describe your organization's plan of implementation for integration of services, functional alignment of staff, and workflow within the Northwest Indiana WorkOne system. How will your organization achieve an integrated system, operate the common information management system known as Indiana Client Connect, communicate within each WorkOne Center, between Centers, Management, and the One Stop Operator. Describe how your organization will functionally supervise staff from different organizations. How will you integrate with the formal supervisors from various providers?
2. **Training/Professional Development:** What types of training/Professional Development are necessary for the successful implementation of your organization's plan? Describe how you will insure that all staff participates in any training deemed necessary in order to sustain an integrated system while providing excellent customer service. How will you coordinate this activity with the Region One, Manager for Professional Development? Although in some cases the One Stop Operator may procure the training, your budget should include a line item to project the cost of internal and external staff training.
3. **Operations & Services**
 - a. **Center Management:** Describe how your organization is uniquely positioned to serve each community where the WorkOne's are located. Describe how the work will be delivered in small and large sites. Describe how the work is similar and/or different in large and small sites. Describe your organization's history in providing services in large and small sites. Describe how your organization will assume the responsibility of implementing and overseeing center/centers. This includes performance, facilities management, policy, procedures, flow, work culture, security, and staffing.
 - b. **Marketing and Outreach:** Describe the role of outreach and marketing as it relates to Center Management. How will you partner with the Regional Marketing Director of WorkOne to implement marketing strategies? Describe how all communities for which you are bidding in the region will be made aware of the availability of WorkOne. Describe how your organization would work with the One Stop Operator to market the availability of services at access points.
 - c. **Services of Resource Teams and Career Advising Teams:** Describe how the staff from the teams will provide the full range of services to all customers entering the WorkOne Center. How will customers move from one level of service to another? What is your organization's model for delivering case management,

career advising, and employment counseling? How will staff manage customers through job placement and retention? Describe how educational support activities including adult education will be leveraged and accessed for customers. Describe how staff will determine a customer's appropriateness for training services and how funds will be managed appropriately for those entering training. Describe how all "products" available in the WorkOne Centers will be utilized to optimally serve the customer. What innovations does your organization bring to create customer engagement?

- d.** *Services at Access Points:* Each WorkOne location is required to have at a minimum one active and functioning Access Point. Describe your understanding of an Access Point and how it relates to and supports a WorkOne Center. How will your organization determine locations to set up access points for services? Describe how your organization would work with community organizations to partner at these access points. Describe how your organization will maintain active communication with the Access Points site(s). How will you measure success at an Access Point?
- e.** *Services of Business Services Team:* How will you insure the Business Services Representative(s) from your organization are positioned to serve the entire Region via an industry cluster approach and not just one WorkOne site? What is your organization's approach to business account management? How will business team members establish and maintain relationships with businesses in our region? Describe how a Business Services team member will provide early intervention services for businesses at risk. Describe any intent to provide business services outside of WIA funding, (i.e. fee for service through such activities such as WorkKeys or other assessments, drug testing etc). To what extent have you conducted fee for service in the past? Provide an assurance that any program income generated will be used in the Northwest Indiana Regional Workforce Area.
- f.** *Services of MIS:* Describe the organization's experience, capacity, and expertise for handling electronic data collection, documentation, validity checking, and reporting. How will the organization engage frontline staff at the WorkOne Center in the MIS operations? Describe how you will coordinate this work with the One Stop Operator & Master/Elite User. Describe how you will quality control and monitor electronic records in accordance with all applicable Federal, State, and Regional requirements while utilizing the state required information management reporting system. Define your track record with ensuring accuracy and alignment between the customers' needs and barriers, case plans and service delivery for case management. Define data validation and responsive data oversight. What percentage of records for each programming area will you monitor, how will you monitor, who will monitor, and at what depth? Which positions in your organization will deliver on these requirements?

- g.** *Services of IT:* Describe your organization's experience, capacity, and expertise for providing technical support for basic technology services, trouble shooting, help desk, and management of networked systems. Describe your organization's experience in providing support for software and hardware set up and repair. Describe how you would coordinate this service with the One Stop Operator and Indiana Department of Workforce Development.
- h.** *Performance:* Describe key performance areas with targets/goals for each area of service and how they support common measure performance. Which metrics are the most important for your organization to insure performances is on track? What frequency are these metrics monitored? How will the organization monitor and build a sustained performance effort from all staff in the integrated system? Describe how you will provide oversight, quality control, monitor files, and track performance in accordance with all applicable requirements utilizing the state required information management reporting system. Indiana Client Connect and Indiana CareerConnect are the current systems used in Indiana. How will your organization create a culture of performance for the WorkOne sites? What support would the organization need from the One Stop Operator to be successful?
- i.** *Staffing:* The Regional WorkOne System has distinct functional roles (Center Manager, Resource Specialist, ICC Specialist, Career Advisor, and Business Services Representative). What level of staff in each functional area is needed to implement the plan your organization is describing? What are the minimum qualifications and level of digital literacy required to perform the various functions? How many staff in each area will be needed at each site to implement your proposed service delivery plan? How would this be split between provider and DWD staff? What would the make-up of the teams be? How do the job descriptions at your organization align with the Regional WorkOne Functional Job Descriptions? Identify the qualifications of all your organization's existing staff that will be involved in delivering these services in the Northwest Indiana Region. Describe how you will involve the Regional DWD Formal Personnel Manager as a partner in managing staff. For MIS staffing, the One Stop Operator will fund equivalent to 3 staff positions. For IT staffing, One Stop Operator will fund equivalent to 2 positions.

Bidding Area 2: Youth Programming and Services

(Only complete this section if you are bidding on Area 2: If not bidding on Area 2: Youth Programming, please proceed to section F management Plan.)

E. Youth Plan of Service *(Proposal Evaluation 20 points - Page Limit – 15 pages)*

1. **Implementation:** Describe your organization’s plan of implementation for integration of services, functional alignment of staff, and workflow for youth services within the Northwest Indiana WorkOne system. How will your organization achieve an integrated system, operate the common information management system known as Indiana Client Connect , communicate within each WorkOne Center, between Centers, Management, and the One Stop Operator.
2. **Training:** What types of training are necessary for the successful implementation of your organization’s plan? Describe how you will insure that all youth staff participates in any training deemed necessary in order to sustain an integrated system while providing excellent customer service. How will you coordinate this activity with the Region One, Manager for Professional Development? Although in some cases the One Stop Operator may procure the training, your budget should include a line item to project the cost of internal and external staff training.
3. **Youth Programming & Services**
 - a. *Youth Program Management:* Describe how your organization is uniquely positioned to serve youth in each of the 12 WorkOne communities. Describe how your organization will assume the responsibility of implementing and overseeing youth programming. Describe how your organization will connect youth programming with the work of the WorkOne Centers. This includes performance, management, policy, procedures, flow, work culture, and staffing.
 - b. *Outreach to Youth:* How will you recruit youth for both in-school and out of school youth programming? Describe in detail recruitment strategies.
 - c. *Youth Model Programming:* Describe your understanding of the JAG model. How does the JAG model impact performance measures for youth? How will you transition and implement the model in areas that have an existing JAG program? How will you implement the JAG program in areas that do not have a current JAG program? For areas where the JAG model is not feasible, describe an alternate program model for in-school youth. Describe evidence of strong successful performance measures being proposed. If applying for out of school youth services describe the chosen program model, the history of the chosen program, and evidence of strong successful performance measures being proposed. *Only proven models of success will be funded.*

- d. *Services to Youth*: How many of each type of youth do you plan to serve in each program model? Describe how your organization will provide the full range of services for youth customers. What is your organization's model for delivering case management, career advising, and employment counseling to youth? How will staff manage youth customers through placement and retention? Describe how educational support activities including adult education will be leveraged and accessed for youth customers. Describe how staff will determine a customer's appropriateness for training services and how funds will be managed appropriately for those entering training. Describe how all "products" available in the WorkOne Centers will be utilized to optimally serve the youth customer. What innovations does your organization bring to create youth customer engagement?
- e. *10 Youth Program Elements*: For in-school youth services, the Workforce Investment Act requires that youth be provided or have access to the 10 program elements. Describe how the chosen model program incorporates all elements as listed below. Include target enrollment numbers for each element, all key milestones and start dates for specific projects.
1. Dropout prevention
 2. Alternative school services
 3. Tutoring, study skills training and instruction leading to completion of secondary school
 4. Adult mentoring
 5. Paid and unpaid work experiences, including internships and job shadowing
 6. Summer employment opportunities linked to academic and occupational learning
 7. Occupational skills training
 8. Leadership development opportunities
 9. Supportive services
 10. Comprehensive guidance and counseling
 11. Follow-up services for not less than 12 months as appropriate
- f. *Performance*: Describe key performance areas with targets/goals for each area of service and how they support common measure performance. Which metrics are the most important for your organization to insure performances is on track? What frequency are these metrics monitored? How will the organization monitor and build a sustained performance effort from all staff in the integrated system? Describe how you will track, quality control, monitor files, and performance manage the targets in accordance with all applicable requirements utilizing the state required information management reporting system. Indiana Client Connect, JAG endms, and Indiana CareerConnect are the current systems used in Indiana. How will your organization create a culture of performance for the WorkOne youth staff? What support would the organization need from the One Stop Operator to be successful?

- j. *Services of MIS (If not answered in bidding area 1):* Describe the organization's experience, capacity, and expertise for handling electronic data collection, documentation, validity checking, and reporting. How will the organization engage frontline staff at the WorkOne Center in the MIS operations? Describe how you will coordinate this work with the One Stop Operator & Master/Elite User. Describe how you will quality control and monitor electronic records in accordance with all applicable Federal, State, and Regional requirements while utilizing the state required information management reporting system. Define your track record with ensuring accuracy and alignment between the customers' needs and barriers, case plans and service delivery for case management. Define data validation and responsive data oversight. What percentage of records for each programming area will you monitor, how will you monitor, who will monitor, and at what depth? Which positions in your organization will deliver on these requirements?

- g. *Services of IT(If not answered in bidding area 1):* Describe your organization's experience, capacity, and expertise for providing technical support for basic technology services, trouble shooting, help desk, and management of networked systems. Describe your organization's experience in providing support for software and hardware set up and repair. Describe how you would coordinate this service with the One Stop Operator and Indiana Department of Workforce Development.

- h. *Staffing:* The Regional WorkOne System has 1 distinct functional role for the youth staff in the Region (Career Advisor). What level of staff is needed to implement the plan your organization is describing? What are the minimum qualifications and level of digital literacy required to perform the various functions? How many staff will be needed (in-school and out of school) at each site to implement your proposed service delivery plan? How does the job description at your organization align with the Regional WorkOne Functional Job Descriptions? Identify the qualifications of all your organization's existing staff that will be involved in delivering these services in the Northwest Indiana Region. The One Stop Operator will fund one Youth Coordinator.

- i. Required exhibits for this section which do not count toward the page limit:
 - o Attachment C (Youth Planned Service Levels)

F. Management Plan *(Proposal Evaluation 10 points - Page Limit – 1 page)*

1. Describe your approach to managing the work and the integrated staff for the areas you are bidding on. How will the managing and reporting structure efforts support and engage staff? How will management and support staff interface with the integrated staff teams?
2. Identify which management position(s) you would co-locate at the One Stop Operator office. Describe the strategy and tactics you would incorporate to insure successful integration, performance, and management of your project. How do you see the position(s) interfacing and synergizing with the One Stop Operator Team?
3. Include an organizational chart(s) that illustrates the structure of your staffing to be used in support of the proposed programs. The chart should display the management and administrative staff, as well. If your organization has multiple locations, please indicate which management positions are located within Northwest Indiana Region 1 and those located outside the Region.
4. Create a staffing worksheet or matrix for all positions for which you are requesting funding. This chart should clearly display the number of staff planned for each location along with functional roles and FTE allotment. This should be provided as an Exhibit and as such does not count toward the page limit. In an effort to fully integrate the services, the One Stop Operator is suggesting that title's inside of a bidding organization match the integrated system profiles.
5. Required exhibits for this section which do not count toward the page limit:
 - Proposed Organizational Chart with the positions funded under the RFP
 - Matrix outlining the number of staff by site, functional role, and FTE (including youth staff, if bidding)
 - Organizational job descriptions for all positions funded under this RFP

E. Transition Activities *(Proposal Evaluation 15 points - Page Limit – 3 pages)*

1. Describe efforts that will be made to work cooperatively with the One Stop Operator to ensure a smooth transition of customers, cases, and MIS in Northwest Indiana.
2. If you currently do not provide WIA services in Northwest Indiana for describe how you will work with the other service providers for an efficient transfer of files and customer caseloads.

3. Full transition for client services may occur on or after September 1, 2011. All clients in all programs are expected to be transitioned. Describe in detail your plan for ensuring that services to all clients will continue with little or no interruption during the transition. This description should specifically include a discussion of how services will be available in counties where your organization is not presently a service provider.
4. Describe how you will work with existing WIA providers to ensure a seamless coordinated transition.
5. How will transitioning impact staffing and hiring plans? Include the selection of staff and a hiring plan with a timeline to ensure continuous service. Describe in detail recruitment strategies for each functional position. Give a detailed plan for on-boarding for staff by functional position. For each functional position, what training and professional development will you implement and when? Who will provide the training? How will you coordinate with the Region's Professional Development Manager?
6. Required exhibits for this section which do not count toward the page limit:
 - o Transition Plan timeline with specific dates, activities, and position responsible

F. Financial Management and Budget (*Proposal Evaluation 15 points - Page Limit – 2 pages*)

1. *Financial Management:*
 - i. Bidders must maintain a financial management system that is auditable and in compliance with generally accepted accounting principles. Financial records must be available for audit and monitoring purposes. Bidders should provide a brief description of the internal financial accounting and management system. Provide an explanation and samples of special reports you generate for your own management purposes or the purposes of your funding sources for the purpose of reporting and managing the funds you receive. Provide an assurance that you will participate, financially and operationally in regular reviews of your performance, including special report generation. Bidders should address the accountability of the organization in this section and provide one copy of the audit report for the most recent two years. If the bidding organization does not have audit reports, please provide the past two years (year-end) financials.
 - ii. Describe how funds will be managed to ensure that targeted expenditure levels are met but not exceeded within a reasonable cost per placement, and to ensure that these services remain available to clients throughout the program year.

- iii. Has your organization had any questioned costs, disallowed costs, or compliance monitoring findings in the last three years? If so, submit documentation that these issues have been satisfactorily resolved. Provide copies of your fiscal monitoring reports for the last two years, along with resolution letters to clarify.
- iv. Contractors are responsible for the repayment of costs determined to be disallowed in accordance with applicable statutes, regulations, directives or mandates. Contractors must repay disallowed costs to the Board's Fiscal Agent within thirty (30) days of the final audit determination. Any disallowed costs must be repaid from local or unrestricted funds. If WIA costs you incurred in the Northwest Indiana Region 1 were subsequently disallowed as a result of audit or monitoring, does your organization have the capability to repay these funds? From what source? Is your organization eligible for a fidelity bond?

If you are an existing WIA service provider in Northwest Indiana Region-One, please confirm that your organization has secured a minimum of 1% of the total grant funds requested as undesignated non grant funds or local funds to cover any disallowed costs. The funds must actually be secured at the time of contract signing.

If you are not an existing WIA service provider in Northwest Indiana – Region One, your organization must develop a plan to secure a minimum of 1% of the total grant funds requested as undesignated non grant funds or local funds to cover any disallowed costs. The plan must be submitted within the first 6 months from the date of the signed contract and by 18 months of the signed contract, funds must actually be secured.

- v. Current providers must identify any leases currently held for WorkOne locations and/or equipment (including copiers, postage machines, etc.). In addition, any organization that is a successful bidder must agree to hold leases on WorkOne locations and equipment.

2. *Budget:*

- i. The bidder should complete PY'09 budget on the included Attachment B and Attachment B-1. Do not deviate from the budget format provided or your submission will be disqualified from consideration. If you propose to provide additional funding from your corporation to supplement the allocation, there is a place on the budget to provide that information and please explain this in the notes section. Please list all organization funding on the document. In your narrative you need to identify all sources and any restrictions on the use of all funds. This information is required as a part of the proposal and must be included in the page of page numbering, but does not count toward the 30-page proposal limit.

- ii. For the purpose of this bid, CWI and the NWIWB is interested in the planned amounts for management of service provider staff, overhead costs and the amount planned for direct client costs, as well as the plan by location and management cost centers. The higher the percentage of costs planned for WIA clients and the lower the percentage for administration/overhead costs the better. This RFP will only allow payment for up to four weeks (30 days) of vacation per individual annually, regardless of any organizational vacation policy. If your company exceeds four weeks of paid vacation those days must be paid with non-WIA grant funds. Two of the four weeks must be taken and not paid-out at any given time and in any given year. According to DWD policy 2005-18, only reasonable severance may be offered. CWI interprets reasonable severance as no greater than two weeks.
7. Required exhibits or attachments for this section which do not count toward the page limit:
- Attachment B-1 budget form
 - One page budget narrative.
 - Submit one copy of your audit report for most recent two years, separate from the proposal and should not be included in the page of page numbering. If the bidding organization does not have audit reports, please provide the past two years (year-end) financials.
 - Submit a copy of your most recently filed IRS Tax filing (990 or other).

Definitions for Attachment B-1

Program Costs include all costs associated with service staff salaries (this would include each staff members salary for Resource team members, Career Advising team members, Business Services, Youth, Youth Coordinator, and Center Managers), fringe benefits, rent, equipment, travel, staff training, supplies and all other non-client service costs. These costs are broken out by Adult, Dislocated Worker and Youth programs.

Management Costs include all costs associated with management staffing within the region and located outside the region. These costs include salaries for Executive Director, President, or Chief Executive Officer; Controller or Accountant or related titles; MIS or Quality Control; Human Resources, Information Technology or Consultants who would fill those positions; and support staff to the previously mentioned positions, fringe benefits, rent, equipment, travel, staff training, supplies, accounting, audit, monitoring and all other management costs not associated with direct service to clients. These costs are broken out by Adult, Dislocated Worker and Youth programs. No more than 7% of total budget is allowed for management overhead and related expenses. Please include expenses related to the co-location of the management position(s) at the One Stop Operator office.

Direct Client Costs are those costs that directly benefit WIA clients. These costs are broken out by Adult, Dislocated Worker and Youth Programs. Such costs include supportive services, tuition, supplies, books, work experience wages, on the job training, and any other cost that directly benefits the WIA customer not included in the other definitions above.

One-page Budget Narrative should be attached that describes the cost basis and the philosophy of the bidder with respect to minimizing overhead costs while maximizing client investment. The budget narrative should be used to clarify and annotate the budget. If you propose to provide additional funding from your corporation to supplement the allocation, there is a place on the budget to provide that information and please explain this in the notes section. Please list all organization funding on the document. In your narrative you need to identify all sources and any restrictions on the use of all funds. This information is required as a part of the proposal and must be included in the page of page numbering, but does not count toward the 30-page proposal limit.

Proposal Requirements

- A. Letters of intent to bid on this proposal must be submitted by 4:00 Central Standard time on June 13, 2011.
- B. All applicants must attend a mandatory bidders conference on June 14, 2011 at CWI, 2804 Boilermaker Court, Suite E, Valparaiso, Indiana from 10:00 – 11:30 a.m.
- C. All proposals must be received no later than 3:30 Central Standard Time on July 5, 2011 in person or by mail or ground delivery to the address indicated above. Proposals received after that time will be rejected. The proposals must be received at the address noted in E, not postmarked by the deadline. Faxed and electronically transmitted proposals will be disqualified from submissions and will not be considered.
- D. Each respondent must submit one original (marked “Original”) and ten copies of your proposal on 8 1/2” x 11” white bond. You may single space your proposal but margins must be at least an inch and font size must be no less than 12. All copies should be submitted unfolded and unstapled. In addition to the hard copies, provide an electronic copy of the narrative and budget. The electronic version may be emailed to rminton@innovativeworkforce.com
- E. Your response to the narrative section of the proposal is limited to no more than 30 pages with specific suggested maximum page limitations provided for each section. The total page limitation is firm and is imposed for the sake of the reviewers of your proposal. In the event your response to a specific section is less than the suggested maximum page limit, the remaining pages may be used in another section as long as the total page limitation for the proposal is not exceeded. This limitation does not include other sections of your proposal such as: Attachments, Exhibits, the one page budget narrative, organizational charts and partner letters and letters of agreement by partners. The entire proposal, including Attachments, Exhibits, one page budget narrative, organizational chart and letters must be numbered Page of Page and all included in the document.
- F. Proposals may be submitted “Return Receipt Requested.” If hand delivered, the deliverer must have a prepared receipt for signature and time/date. Faxed or electronically transmitted proposals will not be accepted. The transmitting envelope will be clearly marked “proposal” and addressed as follows:

Attention: Robyn Minton, One Stop Operator
c/o The Center of Workforce Innovations, Inc.
2804 Boilermaker Court, Suite E
Valparaiso, IN 46383

- G. Assemble your proposal using the following order. Use this as a checklist to ensure the proper order. On July 1, 2011 we will conduct an administrative review of all proposals submitted on time. Failure to follow RFP instructions or not submitting all required documents will result in rejection and disqualification of your proposal.
- Cover Page (Attachment A) – Required as a part of the proposal and must be included in the page of page numbering, but does not count toward the 30 page proposal limit.
 - Table of Contents - Required as a part of the proposal and must be included in the page of page numbering, but does not count toward the 30 page proposal limit.
 - Proposal Narrative (IMPORTANT): **The proposal narrative must have the Table of Content headers and must repeat the question or element being responded to in each section consistent with the narrative in the RFP.** The goal is for your responses to be as succinct, yet comprehensive as possible.
 - Exhibits – Exhibits are required as a part of the proposal and must be included in the page of page numbering, but they do not count toward the 30-page proposal limit.
 - Most Recent Business Entity Filing
 - Current Organizational Chart which clearly depicts lines of responsibility and authority
 - List of References* - Provide no **more than five** references complete with address, voice, e-mail and fax *We will not accept as references individuals on the Regional Workforce Board, the Center of Workforce Innovations Board and staff, the Local Elected Official Board, or Department of Workforce Development employees.
 - A signed corporation resolution(s) which:
 - Authorizes the submission of the proposal.
 - Authorizes the signatory on this proposal to sign the proposal, negotiate on behalf of the corporation and bind the corporation
 - A list of current board members and a list of board meeting dates for the next fiscal year.
 - Partnership matrix by county demonstrating effective relationships you have currently in place and any other partners or organizations you plan future collaborations
 - Proposed Organizational Chart with the positions funded under the RFP
 - Matrix outlining the number of staff by site and functional role (including youth staff, if bidding)

- Organizational job descriptions for all positions funded under this RFP
 - Transition Plan timeline with specific dates, activities, and position responsible
- Attachment B-1 budget form
 - One page budget narrative.
 - Attachment C (Youth Planned Service Levels)
 - Attachment D (Non-Collusion Affidavit)
 - Attachment E (Assurances and Certifications)
 - Submit one copy of your audit report for most recent two years, separate from the proposal and should not be included in the page of page numbering. If the bidding organization does not have audit reports, please provide the past two years (year-end) financials.
 - Submit a copy of your most recently filed IRS Tax filing (990 or other).
- H. Questions regarding this RFP must be submitted in writing to Robyn Minton, The Center of Workforce Innovations by fax at 219-465-6860 or email (RMinton@innovativeworkforce.com). All questions will be responded to, compiled and shared with all bidders who submitted letters of intent by June 10, 2011 and attended the bidders' conference on June 14, 2011. Questions will be accepted up to 4:00 Central Standard Time on June 10, 2011.
- H. Proposals for each bidding area will be reviewed and rated by a team comprised of individuals from the Board, One Stop Operator staff, DWD staff, or other independent reviewers. The One Stop Operator will select the top proposals and may request those bidders to make a presentation to the Board. Contracting decisions will be a joint responsibility of the Board and One Stop Operator. An award decision is expected by June 24, 2011. Programs shall start August 1, 2011 with transition beginning immediately upon selection. The Board will not be responsible for any cost associated with the transition.

The proposal evaluation weights and page limits by section are specified in each section of the RFP. In the event your response to a specific section is less than the suggested maximum page limit, the remaining pages may be used in another section as long as the total page limitation is not exceeded.

These weights for both bidding areas are also listed below.

Bidding Area 1: Operation and Services of WorkOne Center(s)

5 points	Organization Description, Characteristics, & Qualifications
25 points	Performance History
10 points	Partnership, Coordination, and Integration
20 points	Plan of Service
10 points	Management Plan
15 points	Transition Activities
15 points	Financial Management & Budget

Bidding Area 2: Youth Programming and Services

5 points	Organization Description, Characteristics, & Qualifications
25 points	Performance History
10 points	Partnership, Coordination, and Integration
20 points	Plan of Service
10 points	Management Plan
15 points	Transition Activities
15 points	Financial Management & Budget

PROPOSAL COVER SHEET - ATTACHMENT A

Organization's Legal Name			
Contact Person:			
Mailing Address			
Physical Address			
Telephone		Fax	
E-mail		Cell	
Federal ID #		Website	
# of years potential bidder has been in business under the corporate / business structure submitting the response to this request for proposal.			
	Funding	PY 11	
Total Amount of Funds Requested /Committed	Administration	\$	
	WIA Adult Funds	\$	
	WIA Dis. Wkr. Funds	\$	
	WIA Youth Funds	\$	
	Total Funds Requested	\$	
	Other Funds Committed	\$	
	Total Requested/ Committed Funds	\$	
	Grand Total	\$	
Planned # PY 11			
In-School Youth		Cost Per Part.	
Out-School Youth			
Signature:		Printed Name:	
Signature Board Chair:		Printed Name:	

Check all applicable boxes:

For Profit Corporation		Sole Proprietorship	
Not-for-profit Corporation		Faith-Based Organization	
Partnership		State Agency	
Educational Institution		Labor Organization	
Business Association		Community Based Organization	
Other Public Agency (Specify)		Other	

Attachment C

Youth Planned Service Levels: PY11

Service Category	Projected Number to Serve	Projected Number to be Exited	Projected Number for Work Experience	Projected Number Placed into Employment of Post Secondary Training	Projected Number to receive a Credential
Younger Youth					
Older Youth					
Total Youth					

Attachment D

Non-Collusion Affidavit

State of Indiana

County of _____

The respondent is hereby giving oath that it has not, in any way, directly or indirectly, entered into any arrangement or agreement with any other respondent or with any officer or employee of the Northwest Indiana Workforce Board whereby it has paid or will pay to such other respondent or officer or employee any sum of money or anything of real value whatever; and has not, directly or indirectly, entered into any arrangement or agreement with any other respondent or respondents which tends to or does lessen or destroy free competition in the letting of the agreement sought for by the attached response; that no inducement of any form or character other than that which appears on the face of the response will be suggested, offered, paid, or delivered to any person whomsoever to influence the acceptance of the said response or awarding of the agreement, nor has this respondent any agreement or understanding of any kind whatsoever, with any person whomsoever, to pay, deliver to, or share with any other person in any way or manner any of the proceeds of the agreement sought by this response.

Signature of Authorized Representative

Print or Type Name

Subscribed and sworn to me this day ____ day of _____

Notary Public

County of

Commission Expiration Date

Attachment E

Assurances and Certifications

The authorized representative agrees to comply with all applicable State and Federal laws and regulations governing the Workforce Investment Act, Workforce Investment Boards, Regional Workforce Boards and any other applicable laws and regulations.

In addition, the authorized representative assures, certifies and understands that:

1. That it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws: Section 188 of the Workforce Investment Act of 1998; Title VI of the Civil Rights Act of 1964, as amended; Section 504 of the Rehabilitation Act of 1973, as amended; The Age Discrimination Act of 1975, as amended; and Title IX of the Education Amendments of 1972, as amended. The Board also assures that it will comply with 29 CFR part 37 and all other regulations implementing the laws listed above. This assurance applies to the WIA Title I financially assisted program or activity, and to all agreements that the Board makes to carry out the WIA Title I financially assisted program or activity. This WIA Title I funded program is an equal opportunity employer / program. Auxiliary aids and services will be made available upon request for individuals with disabilities.
- 2. The proposing organization has not been debarred or suspended or otherwise excluded from or ineligible for participation in federal assistance programs.**
3. The proposing organization possesses legal authority to offer the attached proposal.
4. A resolution, motion, or similar action has been duly adopted or passed as an official act of the organization's governing body authorizing the submission of this proposal.
5. A drug free workplace will be maintained in accordance with the State of Indiana requirements.

Signature of Authorized Representative

Print or Type Name

Date

SAMPLE LETTER OF INTENT TO BID ON SERVICES

Center of Workforce Innovations
Attn: Robyn Minton, VP of Operations
2804 Boilermaker Court, Suite E
Valparaiso, IN 46383

Dear Ms. Minton:

Our organization _____ located in _____ intends to bid on the following services in Northwest Indiana – Region One.

_____ *Bidding Area 1: Delivering Services inside the 12 WorkOne Centers*

_____ *Bidding Area 2: Youth Programming*

Sincerely,

GLOSSARY OF TERMS

ICC Specialist: Match job ready customers with jobs and work closely with Career Advisors and Business Services Representative

Business Services Representative: Connect business in Region 1 to WorkOne Centers.

Career Advising Team: This team is comprised of staff in the functional role of Career Advisors. In this position, Career Advisor's provide core and intensive services and case management in order to move customers into employment. The Advisor consults with customers, interprets assessment results, completes and approves Academic Career Plans, provides ongoing employment and career counseling, offers training opportunities, and job search experiences with a specific emphasis on preparing customers to be job ready, job matching and placement to job orders. Career Advisors must complete no less than monthly intensive employment or career counseling activities in order to engage customer effectively.

Center Manager: Oversees all day-to-day activities within the WorkOne office which has been assigned to them. The Center Manager will work in coordination and in conjunction with a multitude of partners and functionally supervises all staff in the WorkOne Center.

Common Measures: Performance standards for adults, dislocated workers, and youth enrolled into any of the following programs: Wagner-Peyser, Workforce Investment Act, Veterans, and Trade Adjustment Act. These measures for adults and dislocated workers include placement into employment; job retention; and average wages. Measures for youth include placement into employment, military, or post secondary training; credential; and literacy and numeracy improvement. For more information on common measures please see the Department of Labor, Employment and Training website:
http://www.doleta.gov/performance/guidance/tools_commonmeasures.cfm

Indiana Career Connect: The State of Indiana's public labor exchange database. This database provides a comprehensive source of Indiana's job openings to assist job seekers in finding employment based on skills and experience and an extensive number of qualified job seekers for employers needing employees. The database can be found here:
<https://www.indianacareerconnect.com/>

Indiana Client Connect: The official database/case management system for all customers receiving services within the WorkOne system

In-School Youth: Youth between the ages of 14 and 21 who are enrolled in secondary school, alternative school, or post secondary training at the time of enrollment into a Workforce Investment Act program.

Leadership Team: Team members made up of Executive Staff from the providers, DWD Management, and staff from the One Stop Operator. The members of the Leadership Team help implement the Integration Strategy developed by the One Stop Operator.

Older Youth: Youth between the ages of 19 and 21 at the time of enrollment into a Workforce Investment Act program.

Out-of-School Youth: Youth between the ages of 14 and 21 who are not enrolled in any type of educational or training program at either the secondary or post secondary level at the time of enrollment into a Workforce Investment Act program.

Resources Team: This team is comprised of staff in the functional role of Resource Specialists. In this position, staff engages customers and delivers informational services at the core level. In addition to, state staff designated as Resource Specialist may also perform program specific tasks such as UI, WPRS and/or REA. They will refer customers to the services provided by our official WorkOne partners and other Faith-based/Community-based partners they need outside our offices. The most important aspects of this position are making customers feel welcome and providing them the information/resources they need.

Tiers of Service: Customer movement from Core to Intensive, and/or Training through to employment within the WorkOne system.

Younger Youth: Youth between the ages of 14 and 18 at the time of enrollment into a Workforce Investment Act program.



Welcome Liaison

Mission: Welcome customers in the WorkOne office and determine customer request and direct to appropriate service area.

Welcome Liaison:

In this functional position, Welcome Liaison's will engage each customer upon entry into the WorkOne office. Liaison will be the first line of contact for all customers and as such will be responsible for setting the highest standard for customer service within the WorkOne. The liaison will have a clear understanding of all WorkOne services and deliver informational services at the core level.

Functional Responsibilities:

- Provide premier customer service to all internal and external customers.
- Ensure customers are not experiencing long wait lines.
- Greet customers at front door, quickly assess basic need for visit and direct customer to core or intensive service area.
- Attend staff meetings.
- Contribute as a team member to ensure WorkOne Center performance standards are met and/or exceeded, and compliance with Federal, State, Regional and WorkOne standards.
- Maintain strict confidentiality at all times when handling sensitive information
- Continually seeks and accepts opportunities for professional growth

Knowledge, Physical and Skill Requirements

- Ability to present a professional, enthusiastic attitude through effective communication skills to promote a positive impression
- Excellent customer service skills
- Excellent listening skills
- Knowledge of community resources
- Ability to promote WorkOne products and services
- Stands for periods of time



Resource Specialist

Mission: Upon hearing customers request, professionally deliver core services while promoting WorkOne services in order to move customer to employment.

Resource Specialist:

In this functional position, staff engages customers and delivers informational services at the core level. In addition to, state staff designated as Resource Specialist may also perform program specific tasks such as UI, WPRS and/or REA.

Functional Responsibilities:

- Provide premier customer service to all internal and external customers.
- Maintains strict confidentiality at all times when handling sensitive information
- Provide basic over the shoulder assistance to customers using computers and/or other forms as technology.
- Facilitate orientation sessions, describing the range of services available at the WorkOne.
- Facilitate Core Workshops and/or WorkKeys sessions.
- Set up, schedule and facilitate skills assessments for customers without interpreting results.
- Complete accurate and timely data entry within staff view database(s).
- Monitor and alert Center Manager if customers are experiencing long wait lines.
- Promote WorkOne products and resources to customers.
- Recognize and identify customers who are near completion of the Work Ready program and communicate to Career Advisor.
- Attend staff meetings.
- Submit required reports in a timely manner.
- Contribute as a team member to ensure WorkOne Center performance standards are met and/or exceeded, and compliance with Federal, State, Regional and WorkOne standards.
- Provide support and/or assistance to teammate without being prompted
- Continually seeks and accepts opportunities for professional growth

Knowledge and Skill Requirements

- Excellent delivery of customer service
- Excellent computer skills, including web based products
- Excellent Public Speaking & Facilitation skills
- Excellent listening skills
- Knowledge of community resources
- Knowledge of and the ability to promote WorkOne products and services
- Knowledge of eligibility requirements and funding streams



ICC Specialist

Mission: Assists Career Advisors and customers of Indiana Career Connect (ICC) by providing premier customer service, working together in an integrated manner, and demonstrating teamwork for customer to obtain employment.

ICC Specialist:

The purpose of the ICC specialists is to identify a pool of candidates by matching available (with an emphasis on suppressed) job orders within Indiana Career Connect. Specialists will search for individuals that match skill requirements of suppressed job orders in ICC. Once matches occur, Specialist will determine if match is enrolled or un-enrolled. For customers not enrolled Specialist will market and invite customer to access appropriate WorkOne services, leading to employment. When the Specialist identifies ICC customers currently on a caseload, the Specialist quickly alerts the assigned Career Advisor regarding match.

Functional Responsibilities:

- Provide premier customer service to all internal and external customers.
- Actively supports and demonstrates the vision of WorkOne.
- Maintains strict confidentiality at all times when handling sensitive information
- Performs ICC resets.
- Provide daily current and accurate lists of suppressed job orders to staff.
- Provide daily updated information for main lobby customer terminal promoting current hot jobs.
- Effectively communicate and coordinate with WorkOne Center Managers, Career Advisors and WorkOne staff.
- Demonstrates sound time-management skills by effectively and efficiently organizing, prioritizing and completing all job order and candidate pool lists, and other assignments in a timely manner
- Continually seeks and accepts opportunities for professional growth
- Attend staff meetings.
- Submit required reports in a timely manner.
- Contribute as a team member to ensure WorkOne Center performance standards are met and/or exceeded, and compliance with Federal, State, Regional and WorkOne standards.
- Provide support and/or assistance to teammate without being prompted

Knowledge and Skill Requirements:

- Excellent Computer Skills
- Complete and thorough knowledge and accurate knowledge of ICC
- Ability to collect, communicate information about job seekers in Northwest Indiana
- Ability to interpret a variety of instructions from written, oral, diagram and schedule form
- Knowledge of and the ability to promote WorkOne products and services



Career Advisor

Mission: help each person identify and enhance their skills in order to obtain

Career Advisor:

In this functional position, Career Advisor's provide core and intensive services and case management in order to move customers into employment. The Advisor consults with customers, interprets assessment results, completes and approves Academic Career Plans, offers training opportunities, and job search experiences with a specific emphasis on preparing customers to be job ready, job matching and placement to job orders. Career Advisors must complete no less than monthly follow- along activities in order to engage customer effectively.

Functional Responsibilities

- Maintain strict confidentiality at all times when handling sensitive information
- Administer or proctor appropriate needs assessments with customers to identify skills, aptitudes, interests, and supportive service needs
- Identify each customer's barriers to employment and services to address them
- Facilitate a variety of employment and skill development services for customers addressing their needs in the areas of education, employment and supportive services
- Develop Academic and Career Plans with customers to establish appropriate career goals and specific plans for WorkOne services, skills development activities and job search strategies
- Update and modify plan as needed to ensure customer needs are met
- Refer customers to in-house training or classes at outside training providers
- Provide training vouchers and associated forms to institutions and program service providers
- Develop activities available to customers to enhance their skills, including basic skills development, customer service, computer skills, and job search skills
- Help each customer develop a job search plan and pursue a well-planned job search
- Refer qualified and job ready customers to job orders
- Assess customer's financial need when necessary to justify WorkOne expenditures
- Maintain files within the computer databases ensuring proper documentation is available to support program eligibility and services received
- Maintain knowledge of and communication with other community agencies, programs and training offered. Appropriately refer individuals to community and partner agencies
- Work with other WorkOne staff to continuously engage the customer through his/her attainment of employment goal, placement, and post exit follow-up for retention
- Assist with special projects such as specialized outreach programs to targeted groups and development of new skills training activities
- Maintain customer contact and all necessary follow-up and follow along no less than monthly to post exit

- Attend staff meetings
- Submit required reports in a timely manner
- Contribute in team member role(s) to ensure WorkOne Center performance standards are met and/or exceeded, and compliance with Federal, State, and WorkOne Center rules and regulations
- Promote WorkOne products and resources to customers, including Work Ready Program
- Support other staff as needed
- Continually seeks and accepts opportunities for professional growth

Knowledge and Skill Requirements

- Excellent Counseling skills
- Excellent Listening Skills
- Ability and Knowledge of interpreting assessments
- Excellent organizational and planning skills
- Excellent data entry skills
- Excellent customer service skills
- Knowledge of regional Education and Training offerings, including Adult Education Centers



Business Service Representative

Mission: Assist businesses with retaining, expanding and enhancing employment opportunities in Northwest Indiana while maintaining premiere customer service, working together in an integrative manner, and maintain the integrity of our data.

Business Service Representative

In this functional position, staff meet with businesses, determine their needs, and move them into our WorkOne process. The services provided to businesses are flexible and multi-faceted. Businesses have access to workforce audits and assessments that identify their workforce needs. Workforce professionals within the division are available to identify various outside partners that assist in building and brokering customized training. Partners such as Adult Education, Small Business Development Centers, local and state Economic and Workforce Development resources as well as Chambers assist with the regional businesses needs. Together they demonstrate the highest quality of service for the Region 1 WorkOne system.

Functional Responsibilities

- Actively supports and embraces the WorkOne vision to create a demand driven workforce development system
- Advances the WorkOne primary goal of transition to a business driven system by providing research, development, coordination and implementation of business services strategies
- Maintains strict confidentiality when handling sensitive information
- Effectively markets WorkOne Business Services products and monitors the implementation of those products for specific businesses
- Effectively communicate and coordinate with WorkOne Center Managers and WorkOne staff to execute employer recruitment, customized training, and other Business Services projects
- Identifies our businesses workforce needs and implements technical assistance programs for businesses in the usage of industry tools
- Collects skills, demand, and employment needs data and information from businesses in the WorkOne service region and communicates this information throughout the WorkOne system
- Seeks to improve the effectiveness and efficiency of all WorkOne Business services activities with constructive and creative approaches to challenges. Understands and internalizes the importance of seeking resolution to problems and concerns in a timely manner.

- Assist in marketing material development and ensures that these materials reflect the highest standards of excellence
- Demonstrates sound time-management skills by effectively and efficiently organizing, prioritizing and completing multiple assignments in a timely manner
- Becomes involved in professional organizations with interest and focus in the area of workforce development, skills development, economic development and other areas of common interest as assigned by Business Services Manager
- Maintains contact and keeps abreast of the current business information available within our region
- Continually seeks and accepts opportunities for professional growth
- Complete a workforce certification program within 12 months of starting in the position of business services representative
- Performs other duties as assigned by the Business Services Manager

Knowledge and Skill Requirements

- Experience in the field of human resource management (private sector experience is preferred)
- Professional work experience in the areas of workforce and/or economic development activities
- Ability to communicate effectively with businesses and WorkOne staff to market business services products and implement business recruitment and training procedures
- Ability to develop and manage regional workforce development projects
- Ability to collect, analyze and communicate data and information about business needs in northeast Indiana
- Ability to solve practical problems in a timely manner and deal with a variety of variables in solving these problems
- Ability to interpret a variety of instructions from written, oral, diagram and schedule form
- Ability to read, analyze and interpret common technical journals, financial reports and legal documents
- Ability to effectively present information to business groups, workforce partners, local elected officials, regional management, and/or the Regional Workforce Board