**Attachment E**

**PROPOSAL CHECKLIST**

**PROPOSAL TO DELIVER WORKFORCE DEVELOPMENT AND CHILD CARE SERVICES**

**IN THE PANHANDLE WORKFORCE DEVELOPMENT AREA**

 **Proposal**

 **Proposal Page number(s) and**

 **Reference in RFP Narrative Description Section, Paragraph**

 **Item or Numbering Reference**

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| Section on**Initial Qualifications for Proposing Entities** Page 13 | Item 1 | Proposal Cover Sheet (Attachment B), Entity’s Legal Organization, HUB Certificate if applicable |  |
| Item 2 | Certificate of status issued by Texas Secretary of State |  |
| Item 3 | Documentation of express actual authority  |  |
| Item 4 | Program Monitoring Reports from last three years |  |
| Item 5 | Fiscal Monitoring Reports, Audit Reports and Management Letters |  |
| Item 6 | Documentation from financial institution supporting availability and amount of funds |  |
| Item 7 | Accounting and Procurement Policies and Procedures |  |
| Item 8 | Résumés of key personnel in Program and Fiscal Management |  |
| Item 9 | References |  |
| Item 10 | Certifications and Assurances (Attachment C) |  |
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| Section on**Organizational Capability and Capacity** Pages 14-15 | Item 11 | History of proposer’s organization, location of offices, number of employees, other lines of business |  |
| Item 12 | Staffing Plan:1. Organizational Chart
2. Staffing structure
3. Job description for each type or classification
4. Résumés for all corporate management staff
5. Description of Healthcare Insurance Plan and Coverage, and procurement
6. Procedures for criminal background checks
7. Hiring preferences for staff of current Sub-recipient
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| Section on**Programmatic Experience** Page 15 | Item 13 | List of each contract/grant since 10/1/20 and identifying the following for each:Term of contract or grantFunding sourceFunding agencyFunding amountContact personGeographic area servedPopulation groups servedComparison of actual to contracted performanceMonitoring findings and resolutions  |  |
| Item 14 | * Entity’s most recent experience in delivering workforce services
* At least two funding agency references for each contract in Item 13
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| Section on**Organizational Strategies and Plans** Page 16-18 | Item 15 | Descriptions of how the proposer will utilize the entity’s:a) Experience in integrated service modelsb) Management team buildingc) Management strategiesd) Knowledge, skills, abilities and experience with each program for policies, procedurese) Expertise and experience in: * Monitoring
* Fraud
* Cybersecurity
1. Experience collaborating with employers and businesses
* Job Developments
* Specialized Training
* OJT, work-based learning, Work Experience
* Apprenticeship
1. Innovative strategies for Mobile Workforce Development Services Units
2. Participation in collaborative activities with community partners
3. EO Strategies
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| Item 16 | Descriptions of how the proposer will:a) Provide services oriented to customers’ needsb) Hire, train and retain staffc) Integrate service deliveryd) Provide optimum job seeker servicese) Secure confidential information |  |
| Item 17 | Specify plans, strategies and goals, including targets, for each program:a) WIOA Adultb) WIOA Dislocated Workerc) WIOA Youthd) Reemployment Services and Eligibility Assessment (RESEA)e) Temporary Assistance to Needy Families (TANF) – CHOICESf) Temporary Assistance to Needy Families (TANF) – Non-custodial Parent (NCP)g) Supplemental Nutrition Assistance - Employment & Training (SNAP E&T)h) Child Care Program(s), including Child Care Services Formula Allocation, and Child Care and Development Fund (CCDF) Child Care Local Matchi) CCDF Quality Improvement Activityj) CCDF Quality Improvement Mentor and Assessork) Integrating with Wagner-Peyser Employment Services (ES)l) Integrating with VR Services including, but not limited to, Summer Earn and Learn (SEAL) |  |
| Item 18 | Include the following documents:1. Personnel Policies/Procedures, including, but not limited to:
* Employee compensation and fringe benefits; and
* Holidays, vacation and sick leave.
1. Staff Evaluations;
2. Affirmative Action/Equal Opportunity Plan; and
3. Standard Operating Procedures Manual for workforce development programs.
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| Section on**PWDB Service Delivery Priorities** Pages 18-19 | Item 19 | Strategies the entity will employ to:1. Strive to fully re-open customer access
2. Ensure dedicated business-oriented staff available
3. Ensure dedicated employer services staff
4. Develop and implement employer and labor market information surveys
5. Designate staff to meet program expectations under RESEA
6. Effectively manage ES personnel consistent with the Texas Model
7. Provide orientation and cross-training
8. Maximize availability and provision of training
9. Integrate with AEL
10. Implement Career Pathways approach
11. Outreach, promote and engage:
* Out-of school youth
* Secondary school students
* Job seekers
* Families in need of child care services
1. Ensure under-served and minority populations are presented with “Up-skilling” opportunities
2. Assess and strengthen cybersecurity
3. Improve social media presence and energize website
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| Section on**Financial Experience and Organizational Stability** Pages 19-20 | Item 20 | Descriptions of the entity’s:a) Experience in developing and managing budgetsb) Fiscal management systemsc) Method of self-monitoringd) Expenditures forecasting e) Tracking, obligating and de-obligating education and training payments, supportive services and other direct customer payments |  |
| Item 21 | List or identification of the entity’s:a) Disallowed costsb) Sources and amounts of funds available to pay disallowed costsc) Repayment structure of any disallowed cost(s)d) Details and status of any bankruptcy and indictments or convictions for fraud, embezzlement, theft or conversion  |  |
| Item 22 | a) Fiscal Monitoring Reportsb) Certified statement of taxes paid in fullc) Cost allocation plan d) Information about funds previously de-obligated |  |
| Item 23 | Documentation source of funding sufficient to cover largest cumulative amount of cash requests  |  |
| Item 24 | * Description of entity’s processes and procedures regarding accountability
* Copies of three most recent audits or financial statements, if applicable
* Management Letter comments
* Income statement through November 30, 2020
* Balance sheet through November 30, 2020
* IRS Form 990, if applicable
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| Section on**PROPOSAL BUDGET**Pages 20-23 | Item 25 | Budget Detail Form – Personnel Costs | Attachment D |  |
| Item 26 | Management & Operation Line-Item Budget Form  |  |
| Item 27 | Direct Services by Grant Line-Item Budget Form |  |
| Item 28 | Budget Narrative |  |

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| Section on**PROPOSAL CHECKLIST** Page 24 | Item 29 | Lists all required items of the solicitation in numerical order. | Attachment E – (Current Form) |  |
| Section on**VIRTUAL PRESENTATION**Page 24 | Item 30 | Proposers will each have the opportunity to schedule an optional, virtual (in Closed Session on ZOOM) Senior Manager / PWDB Review Staff workforce system discussion which will be recorded and shared with the PWDB’s Executive Committee during the review process. No Proposers will be present during another Proposer’s discussion. | Scheduled with RFP Point of Contact (Page 7 of RFP) | Page number not applicable |

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| Section on**NOTARIZATION**Page 25 | Item 31 | Certifies that all the information contained in the Proposal is accurate and true, and that the Proposer acknowledges and accepts all instructions, terms and conditions included in the solicitation issued by PRPC and certifies that they have been and will be in compliance. | Attachment F |   |

**Additional items in proposal, if any:**