

# **Delaware County Workforce Development Board**



## **Request for Proposals For the period of July 1, 2021 – June 30, 2023 Financial Literacy for Out-of-School Youth**

Proposals Due: May 5, 2021

RFP Release Date: March 23, 2021

The Delaware County Workforce Development Board is an equal opportunity employer.

Auxiliary aids and service are available upon request to persons with disabilities.

## General Information

The Delaware County Workforce Development Board (DCWDB) is the entity designated by the Delaware County Council to provide staff support and act as the administrative entity and the fiscal agent for the operation of the Workforce Innovation and Opportunities Act (WIOA) Programs in the Delaware County Workforce Development Area (WDA). The DCWDB is a business, education, and community board that is empowered to lead workforce development in Delaware County.

It is the mission of the DCWDB to serve as the local entity, responsible for the strategic planning and promotion of an effective workforce development system in Delaware County that responds to regional labor market needs.

## Statement of Purpose

The DCWDB is issuing this Request for Proposals (RFP) to identify an individual or organization to be the Financial Literacy program provider in the Delaware County WDA. This area contracts with 4-8 providers to offer comprehensive services to Out-of-School Youth (OSY). These providers must connect OSY to Financial Literacy Services in accordance with WIOA. The period of performance will include a base contract year that begins on July 1, 2021 and ends on June 30, 2023, renewed annually at the discretion of the DCWDB. All interested parties are highly encouraged to review this RFP carefully to gain a clear understanding of the DCWDB's expectations regarding the role of the Financial Literacy program provider in Delaware County.

## Contract Award & Funding Available

Please be advised that the level of funding available is subject to change and will not exceed \$50,000. All funding is contingent upon the availability of state and federal funds and the continued authorization of the WIOA activities in Delaware County. Services will commence on July 1, 2021 and end on June 30, 2023 subject to the availability and appropriation of funds.

The proposals submitted in response to this solicitation is not a legally binding document. However, the contents of the proposal of the successful bidder will become contractual obligations and failure to accept these obligations in a contractual agreement may result in the cancellation of the award. Staff will negotiate and execute contracts with the bidder approved for funding. These discussions will take place after final funding approval and may include such items as budget, cost, program design, service levels, location, target population, projections, and clarifications.

## Procurement Timeline:

- Public Notice March 15-22
- Bidder's Conference March 23, 2021 at 1pm
- Release RFP on website March 23, 2021
- Proposals Due May 5, 2021 at 5pm
- Expected Date for Notification of Award June 16, 2021
- Start Date for Contract July 1, 2021

## Bidders' Conference and Questions

A bidders' conference will be held virtually on March 23, 2021 at 1pm. Information will be provided on the DCWDB's website found at [www.delcoworks.org](http://www.delcoworks.org). Registration will be required by email to [schwabeh@co.delaware.pa.us](mailto:schwabeh@co.delaware.pa.us).

At the conference, the DCWDB staff will review the requirements of the RFP and accept questions from the attendees regarding the RFP. All interested applicants are encouraged to attend, although attendance is not required to submit a proposal.

## Submission of Proposals

Submission of proposals unnecessarily elaborate or lengthy is not encouraged. Program narratives are limited to five (5) pages, excluding the coversheet and attachments. Proposals must be submitted in a 12-point font, using standard 8.5" by 11" paper with 1" margins. Page numbers must be provided in the footer. Proposals will only be accepted by email and must be received no later than 5:00 p.m. EST on May 5, 2021. Proposal must be emailed to Kate McGeever [mcgeeverk@co.delaware.pa.us](mailto:mcgeeverk@co.delaware.pa.us) with a subject line of "Financial Literacy program provider Proposal."

Proposals received after this time and date will not be considered for review. Timely receipt of the proposals is the sole responsibility of the proposer.

## Overview: WIOA

The Federal Workforce Innovation and Opportunity Act (WIOA) passed in July 2014 and full implementation was required in stages from July 1, 2015 to July 1, 2016. The purpose of WIOA programs is to move toward a higher level of service for employers and job seekers through better alignment of education, economic development, and workforce development systems at the state, regional, and local levels. WIOA maintains the primary service delivery structure, the nation's network of one-stop career centers, but challenges center Service Providers with high expectations for partner investments, system leadership, engaging employers, sector strategies, prioritizing services for under-served populations and achieving better performance outcomes. Emphasis is placed on achievement of credentials that are valued by multiple employers and are stackable toward more advanced certifications and degrees.

All WIOA information throughout this RFP is designated through the guidance provided by the US Department of Labor and the PA Department of Labor and Industry's Bureau of Workforce Development Administration and is subject to change by these funding organizations. Please visit the USDOL website at <https://www.dol.gov/agencies/eta/wioa> for a more thorough overview of WIOA. All qualified parties interested in submitting a response to this RFP must be familiar with the goals and requirements of WIOA and all its guidelines. The selected contractor must follow and comply with all rules and regulations therein.

## Overview: Out-of-School Youth Programming

The selected provider for financial literacy programming will coordinate with four to eight primary program providers to serve eligible Out-of-School Youth who are enrolled in services with the primary program providers.

An eligible Out-of-School Youth is an individual who is:

- Not attending any school (as defined by State law).
- Not younger than 16 or older than age 24; **and**
- Identified as one or more of the following:
  - A school dropout or a youth who is within the age compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter, and is not enrolled with the in-school provider with plans to return or remain in school
  - A recipient of a secondary school diploma who is a low-income individual and is-Basic skills deficient or an English language learner
  - An individual who is subject to the juvenile or adult justice system
  - A homeless individual, (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e-2(6))), a homeless child or youth (as defined in section 752 (2) of the Mc Kinney-Vento Homeless Assistance Act 42 U.S.C. 11434a (2))), a runaway, in foster care or has aged out of the foster care system, a child eligible for assistance under section 477the Social Security Act (42 U.S.C. 677) or in an out-of-home placement.
  - An individual who is pregnant or parenting
  - A youth who is an individual with a disability
  - A low-income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.

## Eligible Applicants

Entities eligible to apply to be the Financial Literacy program provider include institutions of higher education, community-based organizations, nonprofit organizations, workforce intermediaries, private for-profit entities, government agencies, or any interested organization/individual that is not a restricted entity, can carry out the duties of a Financial Literacy program provider.

The selected contractor will be accountable to the DCWDB and for OSY financial literacy programming within Delaware County. Additionally, the selected contractor will be required to adhere to all laws and policies of federal, state, and local governments that apply to the funding sources.

Eligible applicants must be in good standing with the federal government, must not be debarred, and must have proof of insurance.

Any governmental, nonprofit or private-for-profit organization(s) may apply. Responders must have knowledge, background and extensive experience in working with OSY and must have significant qualifications in the provisions of services as described herein. Providers will be selected through a competitive bid process established by the DCWDB. Emphasis will be placed on organizations that propose creative and innovative strategies, incorporate best practices, and demonstrate the capacity to carry out the proposed program.

## General Policies

- The DCWDB is not liable for any cost associated with responding to this RFP and will not authorize such costs as part of the contract with the selected organization.
- The DCWDB reserves the right to accept or reject any or all proposals received and to cancel or reissue this RFP in part or its entirety.
- The DCWDB reserves the right to award a contract for any items/services solicited via this RFP in any quantity the DCWDB determines is in its best interest.
- The DCWDB reserves the right to correct any error(s) and/or make changes to this solicitation as it deems necessary.
- The DCWDB reserves the right to negotiate the final terms of any and all contracts or agreements with proposers selected and any such terms negotiated as a result of this RFP may be renegotiated and/or amended in order to successfully meet the needs of the workforce area.
- The DCWDB reserves the right to contact any individual, agency, employer, or grantees listed in the proposal; to contact others who may have experience and/or knowledge of the proposer's relevant performance and/or qualifications; and to request additional information from any and all proposers.
- The DCWDB reserves the right to conduct an on-site review of records, systems, procedures, including credit and criminal background checks, etc. of any entity selected for funding. This may occur either before or after the award of a contract or agreement. Misrepresentation of the proposer's ability to perform as stated in the proposal may result in cancellation of any contract or agreement awarded.

- The DCWDB reserves the right to withdraw or reduce the amount of an award or to cancel any contract or agreement resulting from this procurement if adequate funding is not received from the U.S. Department of Labor via the Pennsylvania Department of Labor & Industry or other funding sources or due to legislative changes.
- Proposers shall not under penalty of law offer or provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of the DCWDB for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder.
- No employee, officer, or agent of the DCWDB shall participate in the selection, award, or administration of a contract supported by WIOA funds if a conflict of interest, or potential conflict, would be involved.
- Proposers shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a proposer's bid to be rejected. This does not preclude partnerships or subcontracts.
- All proposals submitted must be an original work product of the proposers. The copying, paraphrasing, or otherwise using substantial portions of the work product from other entities and submitted hereunder as original work of the proposer is not permitted. Failure to adhere to this instruction may cause the proposal to be disqualified and rejected.
- The contents of a successful proposal may become a contractual obligation if selected for award of a contract. Failure of the proposer to accept this obligation may result in cancellation of the award. No plea of error or mistake shall be available to the successful proposer as a basis for release of proposed services at the stated price/cost. Any damages accruing to the DCWDB as a result of a proposer's failure to contract may be recovered from the proposer.
- A contract with the selected proposer may be withheld at the DCWDB's sole discretion if issues of contract, questions of Federal or State regulatory non-compliance, or questioned/disallowed costs exist until such issues are satisfactorily resolved. The DCWDB may withdraw award of a contract if the resolution is not satisfactory to the Board.
- The respondent assures that WIOA funded services, activities and agreements will comply fully with the provisions of WIOA, Section 188, Nondiscrimination and Equal Opportunity regulations (29 CFR Part 38), Title VI of the Civil Rights Act of 1964, The Americans with Disabilities Act of 1990, The Age Discrimination Act of 1975, Section 504 of the Rehabilitation Act of 1973 and Title IX of the Education Amendments of 1972.

## Scope of Work: Financial Literacy for Out-of-School Youth

The duties of the Financial Literacy provider shall include the following:

**Coordination-** The Financial Literacy program provider will coordinate with the primary program providers to schedule financial literacy programming, collect participant information, and report participant progress.

**Assessment-** The Financial Literacy program provider will assess all participants prior to and after programming. Assessments should capture baseline knowledge and skills as well as advancement.

### **Program Implementation**

Programs must be designed to deliver research-based financial literacy programs that address real-life skills and knowledge needed before entry into the workforce. Programming should deliver financial literacy skills and knowledge contextualized for young people entering the workforce. The delivery model should combine online and in person activities. Financial literacy programs should contain at least the following subject matter:

- Income and earnings
- Set and stick to a budget
- Account for all bills and know where your money goes
- Understand how to use a credit card
- Protect your identity and make sure your account information is secure
- Learn about your credit score
- The Basics of Budgeting
- Understanding Interest Rates
- Prioritizing Saving
- Credit-Debt Cycle Traps
- Identity Theft Issues & Safety
- Relating Income and Education
- Becoming a Critical Consumer

**Reporting-** The Financial Literacy program provider will complete quarterly progress reports as well as an annual completion report. The reports must document the number of participants served, delivery of program elements, and increase in skills and knowledge among the participants. This data must be available by individual, primary program provider, and aggregate. Organizations awarded funds will be required to collect, retain and submit information on activities and program outcomes to ensure accuracy and integrity of information collected and reported to the DCWDB.

## Proposal Format

The proposal for the Financial Literacy program provider must be submitted as outlined below.

## Proposal Cover Sheet

The proposal for the Financial Literacy program provider must be submitted using the specified Cover Page.

## Executive Summary

The following should not be more than one (1) page.

- Overview of your organization's qualifications and alignment with the services sought by this RFP.
- Briefly describe your organization's mission and/or vision.
- Concise description of the proposed program.
- Amount of funding requested for the period of July 1, 2021 to June 30, 2022.

## Organizational Overview

The following should not be more than one (1) page.

- Basic organizational description including year established, organizational incorporation status and where incorporated, governance structure, mission, principal programs and services, executive leadership, annual budget, partners and/or subcontractors, and number of staff.
- Demonstrate that your organization's eligibility to participate as the Financial Literacy program provider as described in Eligible Applicants.
- Experience in managing programs of similar size and scope that are specified in this RFP, including but not limited to individuals served, services and activities delivered, contract values, and related performance outcomes.
- Administrative and fiscal capacity including but not limited to your organization's proven ability to utilize information systems, manage resources and personnel, and produce timely and accurate program reports.

## Proposal Narrative

A proposal narrative should not exceed three (3) pages and should address the tasks listed in the scope of work. If a published curriculum will be used to delivery instruction, the scope and sequence and sample pages should be included in an appendix.



## Budget

A budget must be included using the budget forms listed in the appendix. Costs included in the proposed budget cannot already be paid by another source; they must be actual costs incurred in delivering the proposed services, and these funds cannot supplant funds already received by the proposing organization. Please note that while an “other” category is included, cost should be categorized as “other” judiciously. All costs should be accounted for in the budget line items supported by a strong narrative justifying why the funds are needed/critical to the program.

## Budget Narrative

Provide a narrative to accompany the budget that describes the purpose of each cost, explains how all costs are estimated and justifies the need for all costs in meeting contract requirements. This section should not be more than one (1) page.

1. Provide a brief narrative justifying the proposed budget.
2. Describe what procedures are in place to ensure accounting records are supported by source documentation for each transaction.
3. Describe what procedures are in place to assure that allowable costs will be limited to those necessary and reasonable for and directly related to the proper and efficient operation of the youth program.
4. Describe where you are getting additional funds (leveraged funds) and identify the source for all additional funds.
  - a. In-kind contributions
  - b. Direct funds from other funding sources
  - c. Contributions of supplies & equipment from your organization and/or outside contributors
  - d. The value of voluntary labor
  - e. Complete the Federal Funding & Leveraged /Matching Funds chart (Attachment D)

## Allowable Costs by Category

Costs shall be limited to those necessary and reasonable for, and directly related to, the proper and efficient operation of services to youth. Costs are allocated to a cost category to the extent that benefits are received by such category. In addition, in any single costs, which are properly chargeable to more than one cost category, shall be prorated among the appropriate cost categories.

### 1. Administrative

Costs involved in furnishing allowable administrative activities may be chargeable to the administration cost category. Costs may include any staff salaries, fringe benefits, office supplies, equipment, rent and maintenance of office space, utilities, postage and other reasonable expense associated with the provision of these administrative activities.

Such costs may include, but are not limited to:

- Advertising

- Insurance
- Duplication and Printing
- Administrative activities include, but are not limited to:
  - Dissemination of program activity information
  - Coordination activities (w/agencies)
  - Data collection for program evaluation

## 2. Program Services

Costs allocated to the program services category must be directly beneficial to the financial literacy education of a participant. Costs may include staff salaries, fringe benefits, materials, supplies, rent, utilities, participant transportation, meals, health care and medical services, counseling, job search assistance, outreach activities, and incentives based on documented and approved performance goals associated with the provision of these program activities. Costs not included are staff travel associated with conference attendance.

## Line Item Budget

All proposing agencies must submit a detailed line item budget by using the attached budget summary sheets. (Attachment C). A detailed breakdown of all costs between administration and program must be provided and comply with the requirements of all federal and state regulations applicable to federally funded programs. Note: costs shall be limited to those necessary and reasonable for and, directly related to, the proper and efficient operation of the proposed program. The budget must follow the requirements and format identified in this RFP. No handwritten submissions will be accepted.

## Leveraged Funds and In-Kind Services

Proposals should demonstrate a willingness and ability to leverage funds and in-kind services in their program design to address the needs of out-of-school youth. This portion of the proposed proposal will be given strong consideration when reviewed by the Youth RFP Review Committee.

## Proposal Review Scoring Rubric

Scoring for required sections of the proposal will be assigned as follows:

Points Awarded Per Category	
Proposal Cover Sheet	Required, but not scored
Executive Summary	Required, but not scored
Organizational Overview	5 points
Program Narrative	70 points
Budget and Budget Narrative	25 points
Total Points Available	100 points

## Appeal Process

This Request for Proposal contains an allowance for written appeals for disputes involving this procurement action. Appeal dispute sources may include, but are not limited to:

- Unfair competition in the decision-making process
- Illegal/improper act or violation of law

Written appeals must be made to Kate McGeever, Executive Director, Delaware County Workforce Development Board. All disputes will be reviewed by the Executive Director and Customer Services Committee with written response in twenty (20) days. If appealed, the DCWDB's decision is final.

## Post Award Administration

The DCWDB will provide technical assistance and perform financial and programmatic monitoring, careful analysis of performance and the review of documentation and reports throughout the length of the contract award. In addition, an initial six-month monitoring, and then, at least an annual assessment of the Financial Literacy program provider will occur. The DCWDB Youth Committee will be responsible for assessment of the Financial Literacy program provider, reporting assessment results to the DCWDB and Chief Elected Officials.

## Contract Close Out and Record Retention

The sub-recipient must maintain a closeout contract file that includes an official notice of closeout (specify the last invoice date and payment date); all necessary records and appropriate release of liabilities, records, or payments; and the transfer of financial and customer records.

Records are to be retained for a period of three (3) years from the date of the final expenditure report for that funding period to the awarding agency. Regulations that cover records maintained by contractors or subcontractors can be found at 29 CFR 97.36(i)(10). However, any litigation, claim, negotiation, audit or other action involving the records that has been started before the expiration of the three-year period will necessitate retaining the records until completion of the action and resolution of all issues that arise from it. All sub-recipient contracts contain a provision to return participant files to the DCWDB if the contract is not renewed, or the agency goes out of business

**PROPOSAL PROGRAM SUMMARY COVER SHEET**

Agency Name: \_\_\_\_\_

Agency Address: \_\_\_\_\_

Program Name: \_\_\_\_\_

Site Address: \_\_\_\_\_

\_\_\_\_\_

Program Contact Person: \_\_\_\_\_

Contact Information: Phone#: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Total Funds Requested: \$ \_\_\_\_\_

**AGENCY STATUS:** *(Check all that apply)*

Not-For-Profit \_\_\_\_\_ For-Profit \_\_\_\_\_ Corporation \_\_\_\_\_ Partnership \_\_\_\_\_

Proprietorship \_\_\_\_\_ Public Education Agency \_\_\_\_\_ Other \_\_\_\_\_

Private Licensed School by Pa. Department of Education \_\_\_\_\_ Community- Based Organization \_\_\_\_\_

Number of Years in Operation: \_\_\_\_\_ Federal I.D. # \_\_\_\_\_

Number of years operating the same or similar Workforce Development program being proposed: \_\_\_\_\_

Provide contact information for other workforce Development areas and/or administrative entities you have provided youth program services to:

\_\_\_\_\_  
\_\_\_\_\_

***In compliance with this RFP format, and subject to the conditions thereof, the undersigned offers to furnish the services requested and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this proposal and is authorized to contract on behalf of the firm named above.***

\_\_\_\_\_  
Contractor (Agency)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name & Title of Authorized Signatory

\_\_\_\_\_  
Signature of Authorized Signatory

Federal Funding Chart

Complete the table below for determination of the need of your organization to undergo either an organization-wide or program specific audit. Indicate \$0 if no federal funds have been received or anticipated to be expended in the future. If your organization’s federal funding levels fall within OMB circular guidelines necessitating an audit, it is the responsibility of the proposing entity to have one performed in accordance with the circulars. Include dollar amount and funding source.

Total federal funds your organization received during the period: July 01, 2019~June 30, 2020	\$
Total federal funds, excluding this proposal, your organization anticipates receiving during the period: July 01, 2021~June 30, 2022	\$

Leveraged/Matching Funds Chart

Leveraged funds are a very important resource that we cannot overlook when we evaluate the true costs of services and resources provided to our customers. Complete the chart below and clearly describe the amount of all funds that are being leveraged or provided in-kind to support your program to assist us in our on-going effort to evaluate total program costs. Actual costs, minus the funds that DCWDB awards to your program, are known as Leveraged funds. These include in-kind contributions, the value of voluntary labor, contributed supplies and equipment, and additional costs not included in your proposal for cost reimbursement, but are legitimate costs for the services and resources you are providing.

IN-KIND CONTRIBUTIONS	DIRECT FUNDS FROM OTHER SOURCES	SUPPLIES & EQUIPMENT	VALUE OF VOLUNTARY LABOR	TOTAL
<b>Total Funds leveraged/Matched</b>				