



REQUEST FOR PROPOSALS
WORKFORCE INNOVATION and OPPORTUNITY ACT
ADULT AND DISLOCATED WORKER PROGRAM
For
LANE WORKFORCE PARTNERSHIP

Proposals are due by 3:00 p.m. Pacific Time on February 28, 2025 to

Cindy Perry, Director of Workforce Programs

Lane Workforce Partnership

1401 Willamette Street, Second Floor

Eugene, OR 97401

info@laneworkforce.org

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WIOA Adult and Dislocated Worker Program Request for Proposals

Lane Workforce Partnership WIOA Adult and Dislocated Worker Program Request for Proposals

Calendar of Events

January 17, 2025	Request for Proposals is published and available online
January 27, 2025	Virtual Bidders Conference, 1:00 PM Pacific Time
February 21, 2025	Last day to submit on-line questions by 5:00 PM Pacific Time
February 28, 2025	Proposals must be emailed and received at Lane Workforce Partnership info@laneworkforce.org by 3:00 PM Pacific Time
March 10 - 26, 2025	Evaluation period and award recommendation decision
April 17, 2025	Lane Workforce Executive Board Approval
July 1, 2025	Contract period begins

Lane Workforce Partnership WIOA Adult and Dislocated Worker Program Request for Proposals

A. Executive Summary

Lane Workforce Partnership (LWP) is the administrative arm of the Lane County Workforce Development Board, one of nine Workforce Development Boards in the State of Oregon designated by the Governor under the Workforce Innovation and Opportunity Act (WIOA). LWP is issuing this Request for Proposals (RFP) to secure a WIOA Adult and Dislocated Worker Title I Service Provider for the workforce service delivery system in Lane County Oregon. LWP is soliciting proposals from collaborative visionary organizations experienced in workforce development. The organizations that respond to this RFP must demonstrate the capacity, experience, and the community networks necessary to coordinate staff and operate a comprehensive workforce program in Lane County.

This procurement is for a one-year period of performance with the option of extending the contract for four (4) additional one-year periods based on performance and availability of funds. The first one-year period is July 1, 2025 – June 30, 2026.

The current PY 2025/2026 allocation of WIOA Adult and Dislocated Worker Program funds is estimated to be \$532,760 plus an estimated \$302,240 in special program funds for a total of an estimated \$835,000 available through this RFP. This funding allocation is inclusive of proposers' administrative costs. The respondent's budget must include at least 30% of the total funds allocated to direct customer support (support services and training). PY 2025/2026 estimated required levels of participants to be enrolled in services requiring direct participant payments is outlined in the Performance Expectations section of this RFP.

Lane Workforce Partnership is interested in proposals that leverage other funding and resources into the Lane workforce area. Leverage may include items such as grants, cash or in-kind donations, or dedicated workforce resources.

B. Lane County's Workforce System

I. Introduction of Lane County's Workforce System

Lane Workforce Partnership's workforce system encompasses all of Lane County from the coast to the Cascade Range and borders our neighboring counties to the north and south. Geographically, the region encompasses 4,722 square miles – roughly the same size as the entire state of Connecticut. The region is primarily rural with the Eugene and Springfield metropolitan areas located approximately at the center of the county. The WIOA Adult and Dislocated Worker

Provider will be expected to provide services to adults and dislocated workers in all regions of the county (virtually and in-person).

The WIOA emphasizes the alignment of a coordinated workforce system. As a result, in Lane County the workforce service delivery system is a collaborative including:

- Department of Human Services
 - Self-Sufficiency Programs (TANF JOBS/STEP)
 - Vocational Rehabilitation (Title IV)
- Department of Education
 - Lane Community College (Title II)
 - K-12 school districts
 - Lane Education Service District
- Oregon Commission for the Blind (Title IV)
- Oregon Employment Department (Wagner-Peyser Title III)
- EasterSeals Oregon (SCSEP)

II. Lane Workforce Partnership’s 2024 – 2028 Strategic Plan

The Lane Workforce Development Board’s 2024 – 2028 Strategic Plan includes four goals in which support of the WIOA Adult and Dislocated Worker service provider is expected. These are:

Goal 1: Increase awareness and use of the workforce system. The objectives include:

- Create awareness of workforce system services
- Simplify navigation of the workforce system; reducing barriers to access and use
- Create more robust career pathway pipeline awareness across all sectors

Goal 2: Embrace transparency and accountability. The objectives include:

- Transform WorkSource Oregon delivery to fit expected future needs of job seekers and employers to adjust to trends and technology changes
- Prepare for data alignment for shared state and local performance score cards

Goal 3: Create strategic alignment and innovative collaboration among public and private partners and business. The objectives include:

- Influence the regulatory environment to align with the 21st century workforce
- Adopt a list of essential employability skills (EES), define the skill, and determine how attainment is measured
- Include the Voice of Business in the workforce development conversation

Goal 4: Advance equitable prosperity through an inclusive workforce, overcoming barriers to workforce participation. The objectives include:

- Increase diverse access and participation in all public workforce systems through targeted inclusivity initiatives
- Operationalize and influence the utilization of the equity lens on 100% of LWP’s investments.

LWP will provide additional information and training on the strategies and metrics set by the Workforce Development Board.

III. Program Authority

In July 2014, the Workforce Innovation and Opportunity Act (WIOA) was signed into law. WIOA is designed to improve and streamline access to federally funded employment, education, training, and support services to help job seekers as well as services to businesses that assist in building a skilled workforce needed to compete in the global economy. Congress passed the Act by a wide bipartisan majority; it was the first legislative reform of the Workforce Development System in 15 years. WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. Lane Workforce Partnership anticipates that Congress will reauthorize WIOA during the five-year period of this procurement cycle. A successful respondent will be required to comply with any and all legislative changes.

The enactment of WIOA provides an opportunity for reforms to ensure the One-Stop Delivery System (known nationally as American Job Centers and in Oregon as WorkSource Centers) is job-driven, responding to the needs of employers, and preparing workers for jobs that are available now and in the future.

The terms and conditions of this RFP may change based on WIOA legislation, rules, and regulations. For more information on WIOA and the vision for the Adult and Dislocated Worker Program reference:

- Workforce Innovation and Opportunity Act (WIOA) [WIOA Laws, Regulations, & Guidance | U.S. Department of Labor](#)
- WIOA Final Rules and Regulations [2016-15975.pdf](#)
- Department of Labor's Training and Employment Guidance Letters (TEGL) and Training and Employment Notices (TENS) [WIOA Laws, Regulations, & Guidance | U.S. Department of Labor](#)

IV. Historic Service Levels

To be eligible to participate in activities carried out under the WIOA Adult and Dislocated Worker Program, participants shall be enrolled in the iTrac Participant Management System along with any additional eligibility processes to be approved for specific grant funds.

The following historical information is provided to potential applicants for planning purposes only. LWP is seeking the most qualified applicants to apply and encourages application of this information for the estimation of budget and performance information.

Program Year	Carry-in From Prior Year	Number of Enrolled Adult and Dislocated Workers	Number of Adult and Dislocated Workers Receiving Training Services*
PY 21/22	118	363	97
PY 22/23	154	448	95
PY 23/24	99	282	97
PY 24/25	44	Planned 206	Planned 69

**Inclusive of funds in addition to WIOA Adult and Dislocated Worker funds*

In addition to the above, the WIOA Adult and Dislocated Worker Service Provider is expected to provide services to adults and dislocated workers who may be supported from funding sources other than WIOA.

V. Local Area Demographics

Lane County has a diverse mix of industries and residents. Applicants are advised to consider the environmental factors that will contribute to their program design. Below are some key statistics for the Lane County area that applicants should use to inform their proposals under this RFP.

With a population of 381,181, Lane County is the state’s fourth most populous county after Multnomah, Washington, and Clackamas. Eugene is Lane County’s largest city with a population of 178,056. Lane County’s unemployment rate is low, currently at 4.1%. The 2024 ALICE Report (Asset Limited, Income Constrained, Employed) published by the United Way indicates that 47% of Lane County’s residents face significant financial challenges. This includes 32% of families classified as ALICE and 15% of families living below the poverty line. The four largest industries by employment are:

1. Professional/Business Services
2. Healthcare
3. Transportation/Utilities
4. Leisure and Hospitality

Applicants are encouraged to refer to LWP’s 2024-2026 State of the Workforce Report found on our website at www.laneworkforce.org for current information related to Lane County’s economy and the concerns in which the Workforce Development Board is most interested in addressing.

C. Proposal Submission Information

I. Eligible Applicants

Eligible organizations include: An organization (public, private, or nonprofit) of demonstrated effectiveness, with experience in providing workforce services to adults. The organization must be able to independently perform the duties of the WIOA Adult and Dislocated Worker service provider without any conflict of interest.

II. Bidders' Conference

A bidders' conference is scheduled for January 27th at 1:00 PM Pacific Time. The virtual meeting will be held via zoom using the following link:

<https://us02web.zoom.us/j/89325751025?pwd=quob7C7XDlbGFO374WOQfGv2anahIH.1>

III. Technical Assistance

Questions will only be answered in person during the bidder's conference. No questions will be answered prior to the bidders conference on January 27th. Following the bidder's conference, all questions will only be answered in writing and posted to Lane Workforce Partnership's website. Questions may be submitted to info@laneworkforce.org. The last date to submit a question in response to this RFP is Friday, February 21 at 3:00 PM Pacific Time. The last date answers to questions will be posted is Monday, February 24. **In the subject line, clearly state: Question RE: WIOA Adult and Dislocated Worker Procurement.**

IV. Protest of Outcomes

Protesters may only contest the RFP process and not the decision of the selection committee. Protests must be stated in writing and submitted to info@laneworkforce.org no later than seven (7) days after the award of the successful respondent is made public. Protestors will receive a response from Lane Workforce Partnership within seven (7) working days of receipt of their written protest.

D. Instructions for Submission

I. Submission Format

The RFP document(s) may be viewed on the LWP website at www.laneworkforce.org on or after January 17, 2025.

Completed proposals are due electronically to info@laneworkforce.org by 3:00 PM Pacific Time on February 28, 2025. Proposals will not be opened or reviewed after this date. Proposals that do not contain required documents or are submitted in a format other than that specified in this RFP, will be deemed as non-responsive and will not be reviewed.

Required Format

All proposals must be in the following specified format:

- 12-point, easily read font – such as Times New Roman or Calibri
- Proposals shall not exceed 25 double spaced pages
- Page number at the bottom center of each page

Required Proposal Packet Documents

- I. Application Coversheet – Attachment A
- II. Program Narrative
- III. Organizational Administrative/Fiscal qualifications
- IV. Budget with Narrative – See required Budget Shell (budget documents do not count toward page limits)
- V. Additional required documents (does not count toward page limits)
 - a. Certification Regarding Disbarment
 - b. Certification Regarding Lobbying
 - c. Certification of Cost or Pricing Data

II. Proposal Scoring

The maximum points available under this request for proposals is 100 and the proposal sections will be scored as follows:

Section	Points Available
Program Narrative	
I. Program Design	30
II. Performance Expectations	10
III. Service Expansion Plan	10
IV. Staffing Plan	10
V. Demonstration of Collaboration and Partnerships	5
Organization Administrative and Fiscal Qualifications	10
Budget and Budget Narrative	
I. Direct Participant Training and Support Services	10
II. Organization Costs	10
III. Leveraged Resources	5
Total	100

All proposals will be scored based on the responses to the elements and questions in the Program Narrative, Organization Administrative/Fiscal Qualifications, and Budget and Budget Narrative.

III. Insurance Requirements

The WIOA Service Provider, prior to execution of a contract, shall provide all insurance as stipulated in this section. The WIOA Service Provider shall not commence any work, nor will LWP execute a contract, until the WIOA Service Provider obtains, at its own expense, all required insurance as specified below. Such insurance must have the approval of the local workforce board as to limits, form, and amount. The types of insurance the WIOA Service Provider is required to obtain or maintain for the full period of the contract are as follows:

- a. Commercial General Liability: Contractor must carry a Commercial General Liability (CGL) insurance policy on an occurrence basis with a combined single limit of at least \$1,000,000 per occurrence and at least \$2,000,000 in the aggregate

per project, for Bodily Injury, Property Damage, and Personal Injury. The CGL coverage shall include all major coverage categories including without limitation bodily injury, property damage, and contractual liability.

- b. Automobile Liability Insurance, comprehensive form, with limits not less than \$1,000,000 combined single limit when using motor vehicles in performance of actions authorized under this contract.
- c. Physical Abuse and Sexual Molestation Liability: If serving “Vulnerable Populations” (defined as minors, elderly, and persons with disabilities), Contractor must carry a Physical Abuse and Sexual Molestation Liability insurance policy on an occurrence basis with a combined single limit of at least \$1,000,000 per occurrence and at least \$3,000,000 in the aggregate.
- d. Professional Liability Errors and Omissions Insurance: Contractor shall at all times carry a Professional Liability/Errors and Omissions type insurance policy with limits of not less than \$1,000,000 each occurrence and \$2,000,000 in the annual aggregate.
- e. Employee Dishonesty Bond: Contractor shall carry Employee Dishonesty coverage on every officer, director, agent, or employee authorized to receive or deposit funds under this contract or issue financial documents, checks, or other instruments of payment of program costs.
- f. Workers’ compensation and employer’s liability: As statutorily required for persons performing work under this contract. The Subcontractor must carry Workers' Compensation Insurance sufficient to meet statutory limits. If the Subcontractor pays wages directly to trainees under this Contract, the Subcontractor must also carry Workers' Compensation Insurance sufficient to meet statutory limits that covers any and all such trainees. If Subcontractor is a subject employer, as defined in ORS 656.023, Subcontractor shall also obtain employers' liability insurance coverage with limits not less than \$500,000 each accident.
- g. Additional Insured’s Clause. The liability insurance coverages required for the performance of this contract shall be endorsed to name Lane Workforce Partnership, Lane County, the Cities of Eugene, Springfield, Cottage Grove and Florence, their Commissioners, officers, agents and employees as additional insured’s with respect to the activities performed under this contract.

IV. Provisions and Disclaimers

- a. All solicitations are contingent upon availability of funds.
- b. Lane Workforce Partnership reserves the right to accept or reject any and/or all proposals received.
- c. This Request for Proposals (RFP) is for the WIOA Adult and Dislocated Worker Programs.
- d. During the evaluation process, LWP reserves the right to request additional information or clarification from responding organizations, or to allow corrections of errors or omissions, when it may serve the best interest of LWP.
- e. The RFP does not commit Lane Workforce Partnership to award a contract.
- f. Proposals should follow the format set forth in the Proposal Response section of the RFP and adhere to the requirements specified therein.
- g. Costs for developing the proposals are solely the responsibility of the respondents.

- h. Proposals submitted for funding consideration must be consistent with, and if funded, operated according to, federal WIOA legislation, all applicable federal regulations, State of Oregon policies, laws, and regulations, and Lane Workforce Partnership policies.
- i. Any revisions mandated by changes to state or federal regulations will be negotiated during contract award.
- j. The contract award will not be final until Lane Workforce Partnership and the Respondent have executed a mutually satisfactory contractual agreement. No program activity may begin prior to final Lane Workforce Partnership approval of the award and execution of a contractual agreement between the successful bidder and Lane Workforce Partnership.
- k. Lane Workforce Partnership reserves the right to cancel an award if the funding from federal, state, or other sources is not obtained and/or sustained at levels sufficient to allow for purchase of services.
- l. Lane Workforce Partnership reserves the right to determine both the number of participant enrollments, and the funding level of contract(s) finally awarded. Such determination will depend upon overall funding availability and other factors arising during the proposal review process. Bids submitted which are over the maximum amount of funds specified for this RFP will be rejected.
- m. Applicants are advised that documents, with the exception of personnel files, in the possession of Lane Workforce Partnership are considered public records and subject to disclosure under the federal and state public record laws. Bidders must request to have proprietary information redacted when submitting their proposal. Bidders requesting redaction of all contents of a proposal may be considered non-responsive.

V. Required Documentation

For each item listed below, provide the required documentation, either by a brief narrative statement or by copies of the documents requested as an attachment to the proposal (does not count against page limits). If a consortium of organizations is applying, the requested documentation must be supplied for all parties in the consortium.

- a. A description of your organization/agency/district's history or documented capability for tracking/billing federal/state funded programs and general management of federal funds.
- b. Include an organizational chart including all staff titles for this program and demonstrating how the program has a direct relationship to other programs under the organization/agency/district.
- c. Provide a description of your organization/agency/district's board of directors or other appropriate governance structure that is independent of staff and program functions. The board must be of adequate size to ensure broad community representation.
- d. Attach a description of the board's specific functions, including its responsibilities for fiscal oversight, planning, budget approval, and program advocacy.

- e. Demonstrate your organization/agency's compliance with generally accepted accounting procedures pertaining to the use and maintenance of records, books, accounts and other fiscal documents, and ability to manage budgeted funds.
- f. A detailed explanation of procedures for fiscal management and accountability, including internal controls, financial reports produced, budgeting process, etc.
- g. A description of your organization/agency/district's process for monitoring the expenditure of budgeted funds and staying within budgeted amounts for all line items.
- h. Review and acknowledgement of receipt of the attached Federal Terms and Conditions. Applicants are required to adhere to the Terms and Conditions as stated, in addition to all revisions made by the federal government throughout the contract term.
- i. A copy of the organization's/agency/district's most recently completed independent financial audit and management letter. If there were any conditions to be met, include a description of how they have been addressed. The audit is to be submitted as a separate document from your proposal.
 - i. NOTE: If your agency is a new organization and has not had an audit or a financial statement performed, submit a statement from an independent CPA identifying the accounting system and specifying the system is sufficient to meet federal, state, and county requirements.

E. Program Overview

I. Expected Services Provided

The focus of the WIOA Adult and Dislocated Worker Program is to provide workforce development services through a One-Stop Delivery system in partnership with the providers of core programs required through WIOA legislation. As such, it is required that the Adult and Dislocated Worker Services Provider is physically located at the WorkSource Lane Center. WorkSource Lane is the cornerstone of the public workforce development system which houses multiple organizations through integrated service delivery. In order to meet the demands of businesses and produce highly valued employment talent in Lane County, coordination among several key employment, education, and training programs is crucial.

The mission of Oregon's WorkSource Centers is to effectively respond to workforce challenges through high-quality services to individuals and businesses, resulting in job attainment, retention, and advancement. WorkSource Lane delivers workforce services to thousands of area residents who come through their doors each year.

The WorkSource Oregon Operational Standards were originally released in May of 2015, and were updated in 2023. The WorkSource Oregon Operational Standards provide the minimum level of required content and services to be available at all WorkSource Centers in the State of Oregon.

The successful respondent will be expected to ensure the workforce service delivery system is in compliance with the standards as well as engage in continuous improvement activities in accordance with these standards. To view a copy of the current WorkSource Oregon Standards go to: <https://laneworkforce.org/wp-content/uploads/WSO-Operational-Standards-2023.pdf>

The WIOA Adult and Dislocated Worker Program is expected to execute and manage each of the of the following services:

1. Recruitment into services and programs
2. Participant eligibility determination for WIOA Adult and Dislocated Worker Programs and other grant funded programs, including application of Priority of Service and serving identified targeted populations
3. Enrollment into Oregon customer management systems (iTrac)
4. Co-enrollment into multiple programs
5. Career coaching and advising for job seekers
6. Support during training activities
7. Providing support services during enrollment to overcome barriers to employment
8. Providing skills and abilities assessments, including but not limited to essential employability skills and the National Career Readiness Certificate (NCRC).
9. Connecting customers to community resources
10. Developing job and career goals that are responsive to the customer's needs and interests and connecting those goals to program services and activities.
11. Development of Individual Service/Employment Plans
12. Customer portfolio development
13. Active and timely case management
14. Providing follow-up services for a period of not less than 12 months after entered employment
15. Documentation and database management including potential modernization or system changes
16. Workshop development and facilitation
17. Facilitating and understanding the use of e-learning platforms
18. Knowledge of local labor market information for job search and employment support
19. Rapid Response activities before or during local layoffs
20. Business services, working with industry and employers directly
21. Knowledge of local sector strategies

II. Staffing Expectations

Staff must be subject matter experts in all topics related to workforce development (i.e. resume development, assessments, career exploration, and job search strategies). Staff shall have the qualifications for the position for which they are hired. Qualifications may include a mix of education and work experience but is not limited to one or the other.

LWP requires all staff to be trained in Implicit Bias and Trauma Informed Care. At a minimum, applicants shall include a plan for staff training in these areas. LWP insists on exemplary customer service of all service provider staff.

LWP encourages the applicant to propose creative staffing structures that may include full-time dedicated staff, part-time staff, and/or shared positions with partner agencies. Note: the successful respondent shall be required to have no less than one bi-lingual (English/Spanish) staff available during all hours of operation.

III. Expected Performance Outcomes

Performance expectations for Program Year 2025/2026 Enrollments are as follows:

Program	Estimated Carry-in from PY 24	Projected New Enrollments	Total Adult/DW Served
WIOA Adult/DW Enrollments	40	120	160
WIOA OJT Training	0	TBD	TBD
WIOA Scholarship Training	TBD	TBD	TBD
Other Funded Programs:			

In addition to the above enrollment targets, the WIOA Service Provider is expected to meet or exceed outcome performance measures as set by the State of Oregon for LWP. The PY 2025/2026 measures are:

WIOA Title I Adult	PY 2025
Employment Rate 2 nd Quarter after Exit	80.8%
Employment Rate 4 th Quarter after Exit	77.7%
Median Earnings 2 nd Quarter after Exit	\$9,700
Credential Attainment Rate	88.2%
Measurable Skill Gains	51.7%
WIOA Title I Dislocated Worker	PY 2025
Employment Rate 2 nd Quarter after Exit	76.6%
Employment Rate 4 th Quarter after Exit	74.5%
Median Earnings 2 nd Quarter after Exit	\$9,700
Credential Attainment Rate	85.0%
Measurable Skill Gains	39.6%

IV. Budget Availability

Lane Workforce Partnership anticipates allocating \$835 thousand per year to this contract pending funding availability. Funding is subject to change based on the WIOA allocation LWP receives from the State of Oregon. The current funding estimates are as follows:

Fund	Estimated Amount for PY 25/26
WIOA Adult and Dislocated Worker	\$532,760
Other Grant Funds	\$302,240
Total	\$835,000

The estimated funding is based on the WIOA Planning Estimates in TEN 17-24 which reflect a decrease in every category to the State of Oregon. As a result, LWP is being conservative in our WIOA projections. LWP is committed to seeking additional funds to support the needs of our community, which may increase these estimated funding levels over time.

NOTE: A consortium must assign a fiscal agent to manage all funds awarded under this RFP. The fiscal agent will be subject to a pre-contract analysis and approval of its fiscal systems prior to actual contract award.

F. Program Narrative and Budget

I. Program Design (Total Points Available = 30)

A successful WIOA Adult and Dislocated Worker Program ensures seamless service delivery that places the customer at the center of the experience. Please explain your program design that at a minimum meets the twenty-one expected services to be provided (see Section D-I).

II. Performance Expectations (Total Points Available = 10)

Please describe your organization's ability and experience in successfully meeting standard WIOA performance measures. Provide information on strategies used to correct areas of non-performance.

III. Service Expansion Plan (Total Points Available = 10)

While services must be offered by the WIOA Title I Adult and Dislocated Worker Program at the local WorkSource Oregon center, successful applicants will describe how they plan to maximize staff capacity to reach other areas of the community. Please explain your strategy to provide services in multiple locations, including:

- a. In-person at the WorkSource Lane Center in Eugene
- b. Affiliate WorkSource Centers located in Florence and Oregon Department of Human Services offices in Eugene, Springfield, and Cottage Grove.
- c. Virtual services
- d. Infrequent services as needed in communities across Lane County

IV. Staffing Plan (Total Points Available = 10)

Please explain your staffing plan that details expected subject matter expertise and training. The plan should include at a minimum the following positions:

- a. Workforce Programs Supervisor or Lead Worker
- b. Employment Development Specialists (Eligibility Specialist, Case Manager, Career Coach, Career Navigator, Business Services Specialist)

The staffing plan must include staff assigned to:

- a. Eligibility Determination and Tracking
- b. Training programs (scholarship, OJT management, and special projects)
- c. Business services (job development and OJT expansion)
- d. Workshop Facilitation
- e. Bi-lingual services

V. Demonstration of Collaboration and Partnerships (Total Points Available = 5)

Please detail how all services provided will be delivered in an integrated fashion and coordinated at each step in the service delivery continuum with partners. Include details of how you plan to leverage and braid funding sources to ensure there is no duplication of resources, maximum efficiency is achieved, and the requirements and goals of each funded/partner program are taken into consideration.

VI. Administrative and Fiscal Qualifications: (Total Points Available = 10)

- a. Describe your organization’s staffing plan and the qualifications of key staff (attach the resume of each key staff).
- b. Describe your organization’s experience with government contracting/fiscal responsibility of government funds.

VII. Budget and Narrative (Total Points Available = 25)

Provide a budget using the attached Budget Shell template and a budget narrative which describes the methodology for each cost in the detailed budget. The budget narrative is limited to two (2) pages and does not count against the overall page limit of the proposal narrative. In the narrative, include:

- a. Direct Participant Training and Support Services (Total Points Available = 10)
 - i. Customer Support Services – In accordance with the LWP WIOA Support Services policy, costs must be for eligible/enrolled participants.
 - ii. Customer Training Services – In accordance with the LWP WIOA Training Policy, Individual Training/Scholarship and OJT sections, costs must be for eligible/enrolled participants.
 - 1. NOTE: Direct participant costs must equal at least 30% of the total budget.
- b. Organization Costs (Total Points Available = 10)
 - i. Staff Wages/Fringe: In a table format, include position title, name of individual (if known), annual salary, annual cost of employer taxes, annual cost of fringe benefits, the percentage of time the individual will dedicate to

the program and the total overall cost (example included with Budget Shell). Applicant must also describe the fringe benefits: Health Insurance, Dental Insurance, Vision Insurance, Retirement Contributions, etc. LWP will evaluate staffing costs to ensure that applicants demonstrate their commitment to high-quality, sustainable positions for staff.

- ii. Staff Materials and Supplies: Supplies include all tangible personal property other than equipment. Applicant must describe each item (i.e. office supplies, desks, phones, etc.) and associated costs in the budget narrative.
 - iii. Staff Travel & Professional Development: Applicant must provide estimated cost of in-state mileage, professional development/training, per diem. Applicant must include costs and details of Training and Professional Development Opportunities available to staff, may include: Membership in Oregon Employment and Training Association (OETA) and/or the National Association of Workforce Development Professionals (NAWDP); Certified Workforce Development Professional (CWDP) certification; registration and/or attendance at OETA, NAWDP, Oregon Workforce Partnership conferences or trainings; and other trainings as appropriate.
 - iv. Organizational Overhead/Indirect: If indirect charges are included in the budget, include the federally approved indirect cost rate with a copy of the Indirect Cost Rate Agreements with a description of the types of costs. Otherwise, include descriptions and details of specific costs included.
 - 1. NOTE: Include an explanation of the formulas used for determining each line item in your budget narrative.
- c. Leveraged Resources (Total Points Available = 5)
- i. Please describe what outside resources and funding will be leveraged to enhance service delivery, customer service experience, and available training and support activities.