



Request for Proposals

For the period of July 1, 2019 – June 30, 2023

Post-Secondary Connections and Retention

Proposals Due:

June 11, 2019 at 3:00 PM EST

Partner4Work

650 Smithfield Street, Suite 2600

Pittsburgh, PA 15222

RFP Release Date:

May 30, 2019

Partner4Work (TRWIB, Inc.) is an equal opportunity employer.

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

Partner4Work's TANF Young Adult Programs are funded by Temporary Assistance for Needy Families Youth Development Funding provided by the US Department of Health & Human Services (USHHS) via the Pennsylvania Department of Labor and Industry. CFDA #: 93.558. Any agreements resulting from this RFP may be funded by Partner4Work through the TANF grant provided by USHHS and PA L&I. The subrecipient must comply with all applicable regulations and the terms and conditions of the TANF grant.

GENERAL INFORMATION

This section provides general and background information needed to understand the regulatory and programmatic context of this RFP. This section also describes important details regarding the services and stakeholders related to this RFP, as well as characteristics of any agreements that may result from this RFP.

About Partner4Work

Partner4Work (P4W) is the Workforce Development Board (WDB) for Pittsburgh and Allegheny County. We connect funding, expertise and opportunities to develop a thriving workforce in the Pittsburgh region. Nationally recognized for innovation, P4W delivers workforce development solutions to meet the current and future needs of businesses and jobseekers. Through collaboration with 100+ partners, P4W connects more than 60,000 adults and more than 8,000 young adults to training and employment opportunities each year. We help employers, jobseekers, public agencies and policymakers by:

- Providing labor-market insights to help employers and policy-makers make informed decisions.
- Bridging the gap between jobseekers and businesses in need of talent.
- Preparing young adults for their career paths.

Helping businesses find and prepare the talent they need to thrive

As a non-profit organization, P4W offers a wide variety of no-cost services to help regional employers attract the talent they need to thrive. From customized labor market data to assistance with finding diverse talent, P4W is the resource to deliver customized employment solutions for any business.

Breaking down barriers to career opportunities

P4W helps provide adult and young jobseekers with the opportunities to find meaningful employment. Through our providers, we provide access to career training and exploration programs; employment assistance; job search help; and a robust summer jobs program. P4W opens the door to career opportunities.

Providing community organizations with resources to make an impact

P4W proudly partners with more than 80 organizations in Pittsburgh and Allegheny County to provide opportunities for jobseekers and businesses alike. We partner with community-based organizations, economic development agencies, training providers, businesses and educators to collectively bridge the gap between people looking for work and employers in need of talent.

As the WDB for Pittsburgh and Allegheny County, P4W has programmatic and administrative responsibility for services of the Workforce Innovation and Opportunity Act (WIOA) provided in the workforce development areas of Pittsburgh and Allegheny County.

Purpose of this RFP

Partner4Work (P4W) is issuing this Request for Proposals (RFP) to identify partnerships between 2-year degree and 4-year degree institutions that will lead to increased retention, the creation of career pathways, paid work experience and development of experiential learning for [TANF eligible young adults](#) in Allegheny County and The

City of Pittsburgh. ¹The period of performance will include a base contract year that begins on July 1, 2019 and ends on June 30, 2020, with 3 option years, exercised at the discretion of P4W.

Through this RFP, Partner4Work expects to award a single cost reimbursement contract to a partnership model that provides career exploration, career readiness, work experience, ensures a positive transition from a 2-year degree program to a 4-year degree, and results in young adults graduating with a degree and placement in employment. Successful applicants will clearly describe a program model that includes:

- number of new and rollover youth served each year
- number of youth who matriculate from 2-year program to 4-year institution each year
- number who successfully will graduate with an Associate Degree and number who will successfully graduate with a 4-year degree
- number of youth who participate in work experience, with a description of work experience and how youth will be paid

Partner4Work expects to award an amount not to exceed \$170,000/year. The actual amount of award will be based on the proposed budget, availability of funds, and standards for the use of public funds (all costs must be reasonable and necessary, allowable, and allocable to the proper grant/cost categories). P4W reserves the right to vary or change the terms of any contract executed because of this RFP, including funding levels, the scope of work, performance standards, and shortening or extending the contract period, as it deems necessary and in the best interests of P4W. The proposal(s) most advantageous to P4W in terms of quality and cost will be recommended for funding.

All interested parties are highly encouraged to review this RFP carefully to gain a clear understanding of Partner4Work's expectations and the standards and requirements that will govern any agreement resulting from this RFP.

Population to be Served

This RFP will fund programs through The Temporary Assistance for Needy Families Youth Development Program (TANF YDP), funded by The PA Department of Human Services (PA DHS) and administered by the PA Department of Labor and Industry (L&I). Funds awarded through this solicitation must serve youth between the ages of 17-24, with a focus on career exploration and career pathway work leading to the development of foundational and occupational skills and post-secondary education and/or employment.

TANF YDP programs provide quality workforce services for youth and young adults, focusing on employment and education experiences and the development of essential workplace skills. All qualified parties interested in applying in response to this RFP must be familiar with the goals and requirements of TANF YDP and all its implementing guidelines; successful applicants awarded TANF YDP funding must follow and comply with all rules and regulations therein.

The primary goal of Pennsylvania's TANF Youth Development Program is to provide support to families as they make the transition from dependence on welfare to self-sufficiency. Young adults may be eligible for TANF YDF

¹ For the purposes of this RFP City of Pittsburgh participants are not considered Allegheny County. Successful applicant will be required to report on residency and follow the budgeted levels by geography. P4W reserves the right to set funding levels by geography as part of the contract award process.

programming if part of household is receiving TANF cash benefits or if their own income is 235% of the federal poverty line or below.

Successful applicants will be bound by the requirements and regulations of [TANF YDF](#), the [Uniform Guidance, state policy](#), and [Partner4Work policies](#). Proposals should clearly indicate an understanding of these regulations, their requirements, and the opportunities they create. Successful applicants will be required to meet with Partner4Work youth team staff monthly and attend quarterly meetings of youth serving providers.

Participant Eligibility

Every participant must have eligibility determined to receive TANF services. This includes securing appropriate documentation to prove eligibility. More information can be found in the [Partner4Work Eligibility policy](#) and the [TANF Manual](#). Final determination for TANF eligibility is completed by the Pennsylvania Department of Human Services through email verification, facilitated by Partner4Work. While programs may serve youth before TANF YDP eligibility is determined, if a youth is later found to be ineligible for TANF YDP, programs are responsible for repayment of funds utilized to support that youth through non-TANF funding.

All youth served under this solicitation must meet the following eligibility requirements.

	TANF
Age	17-24
Income	Low-income or in receipt of TANF cash assistance benefits (see TANF Manual for more definition of low income)
Work Status	Legally eligible to work in the United States
Residency	City of Pittsburgh or Allegheny County ²
Selective Service	Must meet selective service registration requirements (Males over 18 only)
Number of barriers to be documented	While not required, applicants should propose programming that prioritizes serving individuals with one or more barriers from the list below.
Barriers to employment	<ul style="list-style-type: none"> • A school dropout or individual identified as at risk of dropping out of school; • Basic skills deficient; * • English language learner; • An individual with a disability; • An individual who is court involved or at risk of court involvement; • A child of incarcerated parent(s); • An individual who is in foster care or aging out of foster care; • A homeless individual • An individual who is pregnant or parenting; • A migrant; or • Youth who are in need of additional assistance to enter or complete an educational program or to secure and hold employment*

*See [Partner4Work Eligibility Policy](#) for definition.

² For the purposes of this RFP City of Pittsburgh participants are not considered Allegheny County. Successful applicant will be required to report on residency and follow the budgeted levels by geography. P4W reserves the right to set funding levels by geography as part of the contract award process.

Required Outcomes

TANF programming has a single outcome required by the Commonwealth of Pennsylvania: participation in a workforce development activity. Partner4Work requires TANF programs to meet additional performance measures, outlined below, as well as propose additional measures that reflect the programming being offered.

Once an individual is enrolled into TANF Youth programming, they are counted in performance measures. Proposed programs must be designed to meet or exceed all performance measures listed below.

TANF Primary Indicator of Performance	Negotiated Goal
For all models: Programmatic retention (those who begin and complete a program)	85%
Participation in a Workforce Development Activity (e.g. job readiness training, career exploration)	100%
Participation in Work Experience	100%
Credits and/or credentials earned by participants	Propose

Additionally, successful applicants will be required to meet or exceed all goals identified in the proposal.

Program Dates

The selected applicant will begin delivering services in July/August 2019. The Agreement resulting from this RFP will include four 12-month contract periods, as shown in the table below, with the second, third and fourth contract periods renewable at the discretion of P4W, based on performance of the selected applicant and funds available. P4W reserves the option to modify contracts on a year-to-year basis. The Agreement is not renewable after the fourth 12-month period.

Anticipated Program Dates and Contract Periods		
Contract period 1 (base)	July 2019 – June 30, 2020	Base contract award
Contract period 2 (option)	July 1, 2020 – June 30, 2021	Renewable by P4W
Contract period 3 (option)	July 1, 2021 – June 30, 2022	Renewable by P4W
Contract period 4 (option)	July 1, 2022 – June 30, 2023	Renewable by P4W

Program Cost Reimbursement

Payment related to any agreement resulting from this RFP will be made on a cost reimbursement basis. This means your organization must have the financial capacity to pay all program costs up front. P4W will require an invoice, proof of expenses, and required documentation to process a reimbursement. P4W will only reimburse the provider for actual expenses incurred during the effective dates of the contract. The reimbursement timeline will be finalized during the contract negotiation. Allowable costs will be determined by all applicable federal, state and local regulations, including but not limited to the Uniform Guidance³ and TANF Regulations.

³ See Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards at 2 CFR 200.

Who can apply?

Eligible applicants include non-profit and for-profit organizations, private sector entities, educational institutions, community-based organizations and other entities operating in accordance with federal, state and local law, and in business for at least three years. Applicants must be an incorporated organization. **Eligible applicants must have a DUNS number and be registered in the System for Award Management and have proof of insurance.** Organizations currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by a Federal, State, City or County department/agency, quasi-governmental agency, or Partner4Work (P4W) are ineligible to apply. *See Appendix B for more information on administrative requirements for selected applicants.*

As this RFP is looking for partnerships, it is anticipated a group of two or more applicants will apply as a consortium, **but the lead applicant/fiscal agent must be clearly identified.** In this scenario, P4W will contract with one lead organization. All entities whether directly contracted or subcontracted via the lead applicant/fiscal agent will be held to the requirements of federal, state, and local policies. Please be aware that additional monitoring, compliance, and assessment requirements will become the responsibility of the lead applicant/fiscal agent.

Selected applicants will have demonstrated experience and expertise in the provision of services similar to those described in this RFP.

Applicant Competency

All applicants must have the technical competence, knowledge and expertise, management and administrative capabilities and capacity, professional staff, financial resources and stability, and administrative and fiscal systems to carry-out the work described in this RFP. Applicants must meet high standards of public service and fiduciary responsibility. P4W requires assurance that the selected applicant's performance of the terms and conditions of any agreement resulting from this RFP be undertaken in accordance with the highest level of integrity and business ethics. Applicants must be able to implement a system of self-monitoring, including the review of key data related to performance, quality assurance, financial integrity and accuracy and one-stop center operations. Applicants are responsible for being knowledgeable of all laws, regulations, rules, and policies of the funding sources identified in this RFP. If P4W determines, at its sole discretion, that the selected applicant(s) is not responsible, that it does not possess the administrative, fiscal, and/or technical resources and capabilities necessary to successfully perform under the terms and conditions of an agreement, it shall terminate the agreement immediately.

PROPOSAL PROCESS & REQUIREMENTS

This section provides instructions for preparing and submitting a proposal in response to this RFP, including required proposal contents and format, important dates and deadlines, and how to find out more about the RFP. Before preparing and submitting a proposal, interested and qualified applicants are highly encouraged to read all other sections of this RFP and key source documents referenced throughout, to gain a full understanding of the services requested and provider characteristics and competencies sought.

How to Apply

All proposals must be submitted to Partner4Work (P4W) electronically via email to youth@partner4work.org no later than **3p.m. on June 11, 2019**. Emails must have the subject line "Career Pathways Proposal." Late proposals will not be considered. Proposals must be submitted in 12-point, Times New Roman font, double-spaced with 1-inch page margins. Your proposal will not be considered if page limitations and formatting requirements are not met. Your proposal must contain all the content below in the same general order illustrated. Strong proposals will demonstrate a full understanding of the requirements described throughout this RFP and establish the capacity, expertise and program design needed to meet the required standards and goals.

1. **Cover Sheet** – Use template provided. (*Appendix A*)
2. **Executive Summary** – (maximum 2 pages)
3. **Organization Overview** – Describe each of the following for your organization: (maximum 3 pages)
 - a. Basic organizational description, including but not limited to mission, principal programs and services, executive leadership
 - b. Experience in managing programs similar in size and scope to that required by this RFP,
 - c. Administrative and fiscal capacity, including but not limited to your organization's proven ability to provide fiscal support and oversight, utilize information systems, manage resources and personnel, and produce timely and accurate program reports.
4. **Program Narrative** – (maximum 8 pages)

Provide an overview of the program and model you are proposing, including:

 - The number of young adults (Given the proposal assumes multiple years of service, please be very specific about number of young adults served each year, how many will continue in multiple years of programming vs. be newly enrolled, and what the total number of youth served through four years of programming will be).
 - Role of each partner
 - How participants will flow through the program
 - Outcomes that will be achieved
 - Employer partnerships being brought to the table
 - How young adults will benefit from participation
 - Staffing plan
 - Proposed timeline
 - Connections that will be created to existing P4W programs
 - Recruitment plan
 - Programmatic calendar of interim outcomes and enrollment goals

Strong program descriptions will clearly demonstrate how the applicant will effectively meet all the standards, expectations and desired outcomes found in this RFP.

5. **Budget** – Provide a budget including all program and administrative costs, using the required budget template provided (See P4W webpage for this RFP). All costs must be allowable according to applicable federal, state and local regulations, including but not limited to the Uniform Guidance and regulations of the funding source, and allocable to the proposed program. Effective budgets will enable the proposed program to meet the intent and requirements of the contract, while being realistic, reasonable and prudent, avoiding unnecessary or unusual expenditures. Refer to the appropriate regulations per the funding source in conjunction with the uniform guidance to identify disallowed costs associated with this grant. See Appendix C for further guidance regarding the budget and budget narrative.

6. **Budget narrative** (maximum 2 pages) – Provide a narrative to accompany the budget that describes the purpose of each cost, explains how all costs were estimated and justifies the need for all costs in meeting contract requirements. In your narrative, be sure to clearly communicate the calculation for staff, general operations, technology, administrative, indirect and any other costs necessary to perform the services described in this RFP. A strong budget narrative will minimize or eliminate the need for clarifications from evaluators reading the proposal. See Appendix B for further guidance regarding the budget and budget narrative. If your proposal includes leveraged resources of your organization or another organization, use the budget narrative to describe the actual or estimated value of the leveraged resources. If applicable, also attach a letter of support from any organization providing leveraged resources in support of your proposal.

7. **Attachments (Required)**
 - a. **Signed MOU between partners agreeing to implement project, identifying the lead agency, willingness to subcontract with secondary agency, and expectations of each partner**

Review and Selection Process

All proposals received by the submission deadline will be initially reviewed by P4W for responsiveness and compliance with the specifications and requirements contained in this RFP. Proposals passing the initial review will be scored according to the criteria below. High scoring proposals will clearly demonstrate an ability and likelihood to effectively perform the Statement of Work and meet the standards and intended outcomes of this RFP. Selection of a proposal for contract award will be subject to successful contract negotiations.

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

Proposal Review Scoring Rubric	
Cover Sheet	Required, but not scored
Executive Summary	Required, but not scored
Organization Overview	20 points
Program Narrative	70 points

Budget & Budget Narrative	5 points
Attachments	5 points
Total points available	100 points

The selected applicant(s) will be invited to negotiate a contract for services based on the project described in the proposal and stipulations of the funding source.

Review Timeline (all dates are subject to change):

Proposal due date: June 11, 2019 by 3 p.m.
 Questions regarding this RFP due: June 5, 2019 by 5 p.m.
 Selection of providers: Late June early July

Questions

All questions or requests for additional information must be made in writing to youth@partner4work.org by 5:00 PM EST on June 5, 2019. Answers will be posted publicly at www.partner4work.org. Interested parties are encouraged to check the website frequently for updates. Questions received after 5:00 PM EST on June 5, 2019 will not be answered.

Records and Documentation

The selected applicant must retain, secure and ensure the accuracy of all program files and records, whether related to job seekers, businesses or general operations, in compliance WIOA requirements, related federal and state regulations, and P4W’s record retention requirements. Case files are the property of P4W and must contain a variety of documentation including, but not limited to: program eligibility, suitability, and assessment data; Individual Employment Plans (IEPs); regular customer contacts and updates; progress reports, time and attendance sheets (training services); and case notes. Files must be retained for seven years after P4W reports final expenditures to the funding source. The selected applicant(s) must allow P4W and representatives of other regulatory authorities access to all WIOA records, program materials, staff, and participants.

The selected applicant is responsible for maintaining and securing participant case files at all times, as well as ensuring privacy and protection of all personal information collected from participants per applicable laws, regulations and P4W policies.⁴ Confidentiality of participant information must be maintained, and all case files must be properly stored in a secured space with limited staff access. Each staff member who has contact with participants or participant information must receive training on confidentiality requirements. The selected applicant acknowledges that the use or disclosure of participant information for purposes other than the effective delivery of the services described in this RFP is strictly prohibited. Staff of the selected applicant(s) may have access to this information only on a “need to know” basis. The selected applicant must inform employees that

⁴ P4W’s Personal Information Policy: <https://www.partner4work.org/document/personally-identifiable-information-policy/>

inappropriate use of such information may result in disciplinary action, including discharge, or criminal prosecution if the employee knowingly uses the information for fraudulent purposes.

Disclaimers

- This Request for Proposals (RFP) does not commit Partner4Work to award a contract.
- Partner4Work may select a firm based on its initial proposal received, without discussion of the proposal. Accordingly, each proposal should be submitted on the most favorable terms, from a price and technical standpoint, that the bidder can submit to Partner4Work. Partner4Work may, however, have discussions with those firms it deems in its discretion to fall within a competitive range.
- Partner4Work reserves the right to request additional information from any applicant, request oral presentations from applicants, or conduct site visits from any applicant before a contract award.
- Partner4Work reserves the right to fund portions of a proposal, or to reject any and all proposals in whole or in part. Rejection of a portion of a proposal does not necessarily negate the entire proposal.
- Partner4Work may, at its discretion, adjust the level of funding provided to successful bidders under this RFP and/or consider the funding of proposals not initially funded under this RFP at a later date.
- No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to Partner4Work and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
- The contract award will not be final until Partner4Work and the successful bidder have executed a mutually satisfactory contractual agreement. Partner4Work reserves the right to make an award without further discussion of the proposal submitted. No activity may begin prior to final Partner4Work approval of the award and execution of a contractual agreement between the successful bidder and Partner4Work.
- The submission of the proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged any other individual for the same services performed by the bidder.
- Applicants are advised that most documents in the possession of Partner4Work are considered public records and subject to disclosure. Partner4Work reserves the right to issue additional RFPs if and when it is in Partner4Work's best interest to do so and, may elect to negotiate and issue multi-year contracts to successful bidders under this or subsequent RFPs.
- All programs and activities are designated as equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Contact staff to request assistance with access to this RFP.

APPENDIX A

Request for Proposals Cover Sheet – Post Secondary Connections & Retention

Lead Applicant: Click or tap here to enter text.

A. Contact Information

Organization Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

City: Click or tap here to enter text. State: Click or tap here to enter text. Zip Code: Click or tap here to enter text.

Principal Contact Person: Click or tap here to enter text. Title: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

Fiscal Contact Person: Click or tap here to enter text. Title: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

Executive Director: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

B. Legal Information

Type of organization: For-profit: Non-Profit: Government or School District:

Federal Employer Identification Number (FEIN): Click or tap here to enter text.

Please provide your current [DUNS Number](#): Click or tap here to enter text.

Please provide your current [CAGE Code](#): Click or tap here to enter text.

C. Requirements / Documents (*proposals submitted without these documents will be considered incomplete, please see associated links for more information and instructions as to how to acquire them*) Please note that a single copy of all requirements below must be submitted for EACH Partner, in addition to the lead applicant (if applicable).

- Registration in the [System for Award Management](#) (SAM)
- Completed Pre-award Assessment ([complete online](#))
- Most recent financial audit
- Certificate of Liability Insurance
- Certificate of Worker's Compensation Insurance
- W9

D. Budget Information

	PY 2019 – 2020	PY 2020- 2021	PY 2021 – 2022	PY 2022 – 2023	TOTAL
Amount requested					

Leveraged Funds:

- o Please list all other sources of funding that will support your proposed program, if applicable.

Funding Source	Amount
	\$0.00
	<i>Total</i>

E. Certifications/Authorization

I certify that the above-named organization is legally authorized to submit this application, that the contents of the application are truthful and accurate, and that the above-named organization agrees to comply with all requirements of the RFP. Our organization understands this program operates on a reimbursement model, and we are prepared to front costs related to said program until requirements for reimbursement are met and funds are available for reimbursement.

Printed Name of Authorized Representative

Title of Authorized Representative

Signature of Authorized Representative

Date

Appendix B: Overview of Administrative and Budget Requirements

Overview of Administrative Requirements

At a minimum, all subrecipient organizations must meet the Standards for Financial and Program Management found at 2 CFR 200 in the OMB Uniform Guidance, as well as any regulatory requirements related to the funds. Your organization's financial management system must provide for the following:

1. Tracking spending on multiple individual funding streams

Identification, in its accounts, of all Federal awards received and expended and the Federal programs under which they were received. Federal program and Federal award identification must include, as applicable, the CFDA title and number, Federal award identification number and year, name of the Federal Agency, and name of the pass-through entity (i.e. Partner4Work).

2. Fiscal reporting on an accrual basis

Accurate, current, and complete disclosure of the financial results of each Federal award or program in accordance with the reporting requirements set forth in 2 CFR 200.327 Financial Reporting and 200.328 Monitoring and Reporting Program Performance. If a Federal awarding agency requires reporting on an accrual basis from a recipient that maintains its records on other than an accrual basis, the recipient may develop accrual data for its reports based on an analysis of the documentation on hand. Similarly, a pass-through entity must not require a subrecipient to establish and accrual accounting system and must allow the subrecipient to develop accrual data for its reports based on an analysis of the documentation on hand.

3. Maintaining documentation supporting all spending and assets

Records that identify adequately the source and application of funds for federally-funded activities. These records must contain information pertaining to Federal awards, authorizations, obligation, unobligated balances, assets, expenditures, income and interest and be supported by source documentation.

4. Maintaining internal controls that ensure compliance with all funding regulations

Control over, and accountability for, all funds, property, and other assets. The non-Federal entity must adequately safeguard all assets and assure that they are used solely for authorized purposes. See § 200.303 Internal controls.

5. Producing a budget to actual report

Comparison of expenditures with budget amounts for each Federal award.

6. Processing payments on a reimbursement basis

Written procedures to implement the requirements of § 200.305 Payment.

7. Budgeting and spending funds in allowable cost categories (i.e. direct, indirect, program, and admin costs)

Written procedures for determining the allowability of costs in accordance with Subpart E - Cost Principles of this part and the terms and conditions of the Federal award.

Record Retention

The selected applicant(s) must retain, secure and ensure the accuracy of all program files and records, whether related to job seekers, businesses or general operations, in compliance with WIOA and/or TANF requirements, related federal and state regulations, and Partner4Work's record retention requirements. Case files are the property of Partner4Work and must contain a variety of documentation including, but not limited to: program eligibility, suitability, and assessment data; Individual Service Strategies (ISSs); regular customer contacts and updates; progress reports, time and attendance sheets (training services); and case notes. Files must be retained for seven years after Partner4Work reports final expenditures to the funding source. The selected applicant(s) must allow Partner4Work and representatives of other regulatory authorities access to all WIOA and/or TANF records, program materials, staff, and participants.

Personally Identifiable Information Compliance

The selected applicant(s) are responsible for maintaining and securing participant case files at all times, as well as ensuring privacy and protection of all personal information collected from participants per applicable laws, regulations and P4W policies. Confidentiality of participant information must be maintained and all case files must be properly stored in a secured space with limited staff access. Each staff member who has contact with participants or participant information must receive training on confidentiality requirements. The selected applicant(s) acknowledges that the use or disclosure of participant information for purposes other than the effective delivery of the services described in this RFP is strictly prohibited. Staff of the selected applicant(s) may have access to this information only on a "need to know" basis. The selected applicant(s) must inform employees that inappropriate use of such information may result in disciplinary action, including discharge, or criminal prosecution if the employee knowingly uses the information for fraudulent purposes.

Budget Narrative Instructions

The budget narrative must provide a description of costs associated with each line item in the budget template. It should also include a description of leveraged resources provided (as applicable) to support grant activities.

In addition to a description of costs included in each line item on the budget template, please include the following in the budget narrative:

Personnel: List all staff positions by title (both current and proposed). Give the annual salary of each position, the percentage of each position's time and salary devoted to the project, and the total personnel cost for the period of performance.

Fringe Benefits: Provide a breakdown of the amounts and percentages that comprise fringe benefit costs such as health insurance, FICA, retirement, etc.

Other: Provide clear and specific detail, including costs, for each item so that Partner4Work can determine whether the costs are necessary, reasonable and allocable. List any item not covered elsewhere here.

Indirect Costs: If you include indirect costs in the budget, then include one of the following:

a) If you have a Negotiated Indirect Cost Rate Agreement (NICRA), provide an explanation of how the indirect costs are calculated. This explanation should include which portion of each line item, along with the associated costs, are included in your cost allocation base. Also, provide a current version of the NICRA.

or

b) If you intend to claim indirect costs using the 10 percent de minimis rate, please confirm that your organization meets the requirements as described in 2 CFR 200.414(f). Clearly state that your organization has never received a Negotiated

Indirect Cost Rate Agreement (NICRA), and your organization is not one described in Appendix VII of 2 CFR 200, paragraph (D)(1)(b).

Applicants choosing to claim indirect costs using the de minimis rate must use Modified Total Direct Costs (see 2 CFR 200.68 below for definition) as their cost allocation base. Provide an explanation of which portion of each line item, along with the associated costs, are included in your cost allocation base. Note that there are various items not included in the calculation of Modified Total Direct Costs. See below the definitions to assist you in your calculation.

2 CFR 200.68 Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs.

The definition of MTDC in 2 CFR 200.68 no longer allows for any sub-contracts to be included in the calculation. You will also note that participant support costs are not included in modified total direct cost.

2 CFR 200.75 Participant Support Cost means direct costs for items such as stipends, travel allowances, and registration fees paid to or on behalf of participants or trainees (but not employees) in connection with conferences, or training projects.

See Section IV.B.4. and Section IV.E.1 for more information. Additionally, the following link contains information regarding the negotiation of Indirect Cost Rates at DOL: <https://www.dol.gov/oasam/boc/dcd/index.htm>