



Request for Proposals

For the period of January 1, 2023 to June 30, 2024
With possibility for renewal contracts

BankWork\$® Pittsburgh

Training and Career Services for Financial Services Occupations

Proposals Due:
October 10, 2022

Partner4Work
650 Smithfield Street, Suite 2400
Pittsburgh, PA 15222

RFP Release Date:
September 8, 2022

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

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

Any agreements resulting from this RFP will be funded through public or private grants via Partner4Work as the grant recipient, including the following: WIOA Adult, Dislocated Worker, and Youth Programs - CFDA 17.258, 17.278, and 17.259; Temporary Assistance for Needy Families - CFDA 93.558; Community Service Block Grant - CFDA 93.569; Community Development Block Grant - CFDA 14.218; PAsmart - 095-19-012, and Reentry Employment Opportunities - CFDA 17.270. Exact amounts of funding by source are not yet known. Availability of funds and eligibility of participants will determine actual funding by source. Any entities receiving agreements from Partner4Work through this RFP must comply with all applicable regulations and the terms and conditions of these or other grants, as specified in agreements resulting from this RFP.

Table of Contents

GENERAL INFORMATION	4
About Partner4Work	4
Purpose of this RFP	4
Anticipated Award	5
Populations to be Served	5
Program Dates	6
Payments	6
Who can apply?	6
STATEMENT OF WORK	7
Summary	7
Relationship to Licensing Partners	7
Targeted Populations Served, Geography, and Location of Services	7
Operations and Staffing	8
Promotion, Outreach and Recruitment	9
Screening and Assessment	9
WIOA Enrollment via PA CareerLink®	10
Training and Graduation Event	10
Supportive Services	11
Job Placement and Follow-Up Services	11
Employer Engagement	12
Communication	12
Outcomes	12
Data Collection and Reporting	13
Contract Oversight and Evaluation	13
PROPOSAL PROCESS & REQUIREMENTS	14
How to Apply	14
Review and Selection Process	16
Questions	17
Bidder’s Conference	17
Disclaimers	18
Appendix A – Request for Proposals Cover Sheet	19
Appendix B – BankWork\$® Position Descriptions	20

Appendix C – Administrative Requirements 23

Appendix D – Budget Narrative Instructions 24

Appendix E – Program Partner Roles 25

Appendix F – BankWork\$® Curriculum Overview 26

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

TRWIB, Inc. (dba “Partner4Work”) is the workforce development organization that connects funding, expertise, and opportunities to develop a thriving workforce in Pittsburgh and Allegheny County. With a budget of more than \$22 million in public and private workforce funds, Partner4Work delivers a comprehensive portfolio of programs and initiatives for adults and youth to ensure that current and future needs of employers, job seekers, and underemployed workers are met.

Helping businesses find and prepare the talent they need to thrive

As a non-profit organization, Partner4Work 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, Partner4Work is the resource to deliver customized employment solutions for any business.

Breaking down barriers to career opportunities

Partner4Work helps provide adult and young adult job seekers 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. Partner4Work opens the door to career opportunities.

Providing community organizations with resources to make an impact

Partner4Work proudly partners with more than 80 organizations in Pittsburgh and Allegheny County to provide opportunities for job seekers 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 Workforce Development Board (WDB) for Pittsburgh and Allegheny County, Partner4Work 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. Partner4Work also oversees employment and training programs for recipients of Temporary Assistance for Needy Families (TANF) and the Supplemental Nutrition Assistance Program (SNAP) in Allegheny County.

Purpose of this RFP

Through this RFP, Partner4Work seeks a qualified organization to provide implementation of the BankWork\$[®] program in the Pittsburgh area, including provision of career training, placement assistance, ongoing coaching, and further supports, to a range of individuals with barriers to employment, according to the standards of the BankWork\$[®] program. The successful bidder will implement the BankWork\$[®] program from January 2023 to June 2024, during which time the successful bidder will train 150 individuals - 6 cohorts of 25 individuals each (a standard cohort for the BankWork\$[®] program consists of 25 individuals and is offered on a quarterly basis).¹

Partner4Work, in collaboration with CareerWork\$, the PA Bankers Association, and several of the region’s leading financial institutions, is proud to offer the nationally recognized BankWork\$[®] training program in the Pittsburgh region. Developed by CareerWork\$ and the banking sector, and free to participants, BankWork\$[®] is designed to prepare individuals to become qualified candidates for tellers, customer service representatives, and personal banker positions. In addition to the technical skills needed to succeed on the job, BankWork\$[®] students receive soft-skills training, coaching and mentoring, information about career pathways, interview prep, and other hands-on activities.

¹ Bidders may propose varying the number of cohorts and individuals within cohorts; however, the total number of participants served must not change. Any variation from this standard is subject to review and approval by Partner4Work.

Partnering financial institutions are actively engaged throughout the 8-week training program through hands-on activities such as job shadowing, classroom presentations, and mock interviews. The training culminates in a graduation event and job fair during which graduates are able to apply for jobs and network with representatives of each partnering employer. All graduates are encouraged to join the BankWork\$® Pittsburgh Alumni Network to receive peer support as they launch their careers, as well as to mentor and recruit talent from future cohorts. BankWork\$® Pittsburgh staff, participants, and employers have access to BankWork\$® affiliate cities across the county, with frequent opportunities to meet and share best practices.

See the Statement of Work below for a more detailed description of the work required by the successful bidder.

To find out more about the BankWork\$® program:

- www.partner4work.org/programs/bankworks-pittsburgh
- www.careerworks.org/programs/bankworks/

Anticipated Award

As a result of this RFP, Partner4Work expects to award one fixed price contract, ranging from \$250,000 to \$400,000² in total value for the period of January 2023 to June 2024, with payments based on cost reimbursement. See Payments Section for further information. Partner4Work intends to blend various funding sources, at its discretion and based on eligibility, to support agreements resulting from this RFP. Funding sources may have different participant eligibility requirements. Potential funding sources include the following:

- Workforce Innovation and Opportunity Act (WIOA)
 - WIOA Adult, Dislocated Worker, and Youth Programs
 - WIOA Statewide Activities
 - Reentry Employment Opportunities (REO)
- Temporary Assistance for Needy Families (TANF)
 - Adult Employment & Training Programs
 - Youth Employment & Training Programs
 - Youth Development Program
- Other funding sources
 - PAsmart grants - State of Pennsylvania
 - Industry Partnership grants - State of Pennsylvania
 - Private grants from foundations, businesses, and other entities

Partner4Work may choose to make additional funding sources available through contracts resulting from this RFP, based on availability and allowability. All costs must be reasonable and necessary to carry out planned functions, allowable, and allocable to the contract/cost categories.

Partner4Work reserves the right to vary or change the terms of any contract resulting from this RFP, including funding levels, the scope of work, performance standards, and the shortening or extending of the contract period, as it deems necessary and in the best interests of Partner4Work.

The proposal(s) most advantageous to Partner4Work in terms of quality and cost will be recommended for funding.

Populations to be Served

Partner4Work hopes to reach and support a broad range of populations through the programs solicited by this RFP, including individuals with varying characteristics across age, income, background, employment history, residential location, and other factors. The various funds Partner4Work oversees often include population-specific eligibility criteria (e.g., young adults 16 to 24, Dislocated Workers, recipients of public assistance, residents of certain locations, etc.). The successful bidder may be asked to focus recruitment and engagement efforts on certain population characteristics, depending on the funding made available through contracts resulting from this RFP.

² The range given for contract values is provided for informational purposes only. Applicants should propose a contract value that most accurately reflects costs necessary to meet the requirements of this RFP.

Program Dates

Initial agreements resulting from this RFP are estimated to begin on or around January 1, 2023 and extend until June 30, 2024. Partner4Work may renew awarded agreements beyond June 30, 2024 for up to two additional contract periods, as shown in the table below, with the second and third contract periods renewable at the discretion of Partner4Work, based on performance of the successful bidder and funds available. Partner4Work reserves the option to modify contracts on a year-to-year basis. The agreement is not renewable after the third 12-month period.

Anticipated Program Dates and Contract Periods		
Contract period 1 (base)	January 1, 2023 – June 30, 2024	Base contract award
Contract period 2 (option)	July 1, 2024 – June 30, 2025	Renewable by Partner4Work
Contract period 3 (option)	July 1, 2025 – June 30, 2026	Renewable by Partner4Work

Payments

All funds for any agreement resulting from this RFP will be made available on a cost reimbursement basis. This means your organization must have the financial capacity to pay all program costs up front. Partner4Work will require an invoice, proof of expenses, and required documentation to process a reimbursement. Partner4Work 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.

Invoicing must be submitted to Partner4Work monthly. The successful bidder must also be up-to-date with all PA CareerLink® reporting and documentation requirements in order to receive payment, as applicable.

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. Applicants must be an incorporated organization and have been in business for at least three years. Eligible applicants must be in good standing with the federal government, not debarred, and have proof of insurance and a Unique Entity Identifier Number (previously known as "DUNS number.") Organizations currently barred, 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 are ineligible to apply.

The successful bidder will have demonstrated experience and expertise in the provision of high-quality occupational training services to the target populations described in this RFP, including placing participants in quality jobs. Programs should be grounded in the communities they serve, with staff focused on providing culturally competent services and a history of successfully operating occupational training programs.

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. Partner4Work 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. Applicants are responsible for being knowledgeable of all laws, regulations, rules, and policies of the funding sources identified in this RFP. If Partner4Work 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.

STATEMENT OF WORK

The following Statement of Work describes the programmatic and administrative requirements applicable to any contract resulting from this RFP. The successful bidder, referred to as “SUBRECIPIENT” below, will be required to comply with all standards described herein.

1. Summary

SUBRECIPIENT will implement the BankWork\$[®] program in the Pittsburgh area through an innovative and proven approach to training and workforce development model, driven by the needs of employers and availability of career opportunities. The proposed model must align with the standards of the BankWork\$[®] program, principles and requirements of the Workforce Innovation and Opportunity Act (WIOA), and the PARTNER4WORK vision of a world-class workforce development system, the primary goal of which is to match the labor demands of employers with the skills and talents of jobseekers, helping businesses thrive and creating viable career pathways for residents of Pittsburgh and Allegheny County.

SUBRECIPIENT will train 150 individuals during the term of this Agreement, offering 6 cohorts of 25 individuals each. A standard cohort for the BankWork\$[®] program consists of 25 individuals and is offered on a quarterly basis.³

2. Relationship to Licensing Partners

PARTNER4WORK is the licensed provider of the BankWork\$[®] program in the Pittsburgh region. SUBRECIPIENT acknowledges that all BankWork\$[®] related materials, know-how, and trademarks are the intellectual property of CareerWork\$. SUBRECIPIENT will assist PARTNER4WORK in adhering to the requirements established in the Program License Agreement between CareerWork\$ and PARTNER4WORK. SUBRECIPIENT further acknowledges the role of the Pennsylvania Bankers Association as the official industry champion for BankWork\$[®] affiliate programs in Pennsylvania, and will assist PARTNER4WORK in adhering to the requirements established in the Partnership Agreement between CareerWork\$, Pennsylvania Bankers Association, and PARTNER4WORK.

SUBRECIPIENT will ensure the timely submission of data, outcomes, enrollment plans, class schedules, and other information requested by PARTNER4WORK and/or CareerWork\$. Throughout the term of this Agreement, PARTNER4WORK, CareerWork\$, and the Pennsylvania Bankers Association will have the right to conduct on-site visits at SUBRECIPIENT’s location to review SUBRECIPIENT’s execution of the program (including sitting in on actual training sessions) and to verify SUBRECIPIENT’s compliance with the terms of this Agreement. Should the program end prematurely, SUBRECIPIENT and all involved staff will work to promptly cease all use of program materials and destroy any remaining copies.

3. Targeted Populations Served, Geography, and Location of Services

Eligible and suitable candidates include individuals who:

- are age 18 or older;
- possess a high school diploma or GED;
- have a 9th grade level reading and math proficiency;
- are unemployed or underemployed in low-income or minority communities, and/or facing other barriers to employment;
- demonstrate a strong motivation to work in retail banking in a customer-facing role and the ability to succeed in such a role with support provided by the BankWork\$[®] program; and
- are eligible to work in a financial institution (e.g., have a PA criminal background check free of theft, fraud, or other offenses which disqualify an individual for work in a retail bank).

Highly-qualified candidates include individuals who meet the above criteria and have some experience working in customer-facing roles (e.g., employed in retail/hospitality sector or in an occupation involving customer service or significant volunteer experience that involved similar skills); however, participants may not be disqualified due to a lack of work history in customer service.

³ Bidders may propose varying the number of cohorts and individuals within cohorts; however, the total number of participants served must not change. Any variation from this standard is subject to review and approval by Partner4Work.

Participant screening, intake, training, graduation, job fairs, and other program-related events will take place at a location agreed upon in writing by PARTNER4WORK and SUBRECIPIENT. SUBRECIPIENT is encouraged to develop partnerships throughout Allegheny County to screen and enroll potential participants. SUBRECIPIENT may screen and enroll participants virtually with the approval of PARTNER4WORK.

Based on request by PARTNER4WORK, SUBRECIPIENT will facilitate the BankWork\$[®] program in community locations determined by PARTNER4WORK, including but not limited to UPMC's Neighborhood Center in the East End of Pittsburgh and designated partner agencies located in the South Hills of Allegheny County.

SUBRECIPIENT will make diligent efforts to enroll participants from programs within PARTNER4WORK's network of contracted workforce development programs, including but not limited to PA CareerLink[®], WIOA Adult, Dislocated Worker, and Youth Programs, the Employment Assistance and Retention Network (EARN), and Work Ready.

4. Operations and Staffing

SUBRECIPIENT will provide administrative and operational capacity, staffing, and classroom and event space to administer an effective BankWork\$[®] program.

SUBRECIPIENT must employ highly qualified and professional staff at all levels throughout the period of performance whose quality of work is reflective of the world-class workforce development system sought by PARTNER4WORK. SUBRECIPIENT will ensure all staff adhere to the highest level of professional conduct, demonstrating professionalism and responsiveness at every level of interaction with customers, PARTNER4WORK staff, and other stakeholders. SUBRECIPIENT staff are required to maintain current knowledge and expertise in the following:

- Career counseling and customer service best practices
- Delivery of workforce services to job seekers and businesses remotely, through virtual platforms
- Labor market information, including characteristics of supply (labor) and demand (employers)
- Initiatives, programs, and services of PARTNER4WORK and the broader workforce development system
- Viable career pathways and how to connect with PA CareerLink[®] appropriately
- Impact of trauma and poverty on jobseekers and related interpersonal strategies
- Local resources and services to assist individuals facing barriers to employment
- Culturally competent service delivery
- Federal, state, and local policies, including WIOA and its implementing guidance

SUBRECIPIENT may utilize a staffing model it deems effective to meet the requirements described herein, subject to review and approval by PARTNER4WORK. At a minimum, and in alignment with standards of the BankWork\$[®] program, SUBRECIPIENT will recruit and employ both a BankWork\$[®] Instructor ("Instructor") and BankWork\$[®] Career Navigator ("Career Navigator") to lead screening, enrollment, instruction, coaching, and job placement activities. SUBRECIPIENT grants PARTNER4WORK and CareerWork\$, the right to participate in the selection of BankWork\$[®] Instructor and Career Navigator. SUBRECIPIENT further grants PARTNER4WORK the right to approve or deny SUBRECIPIENT'S recommendations regarding BankWork\$[®] Instructor and Career Navigator candidates.

The Career Navigator should have at least three years of experience in employment services, human resources, social services or another related field; preferably with experience in retail banking. The responsibilities of the position will include coaching and supporting participants as they develop job skills, conducting a post-completion follow-up effort focused on supporting program participants, collaboratively engaging in outreach and recruiting with the BankWork\$[®] Instructor, and working with the BankWork\$[®] national team to update the curriculum and other practices as necessary. SUBRECIPIENT will ensure the Career Navigator meets the criteria established in Appendix B, BankWork\$[®] Position Descriptions.

The Instructor should have a Bachelor's degree or equivalent professional experience, at least five years of experience working in retail banking, and at least three years of professional adult training experience. The responsibilities of the position will include the recruitment and assessment of new participants, instruction in the operational fundamentals of branch banking, individual and group job support coaching, and the management and collection of all data related to the

program. SUBRECIPIENT will ensure the Instructor meets the criteria established in Appendix B, BankWork\$® Position Descriptions. PARTNER4WORK anticipates that the Instructor will be a full-time employee of SUBRECIPIENT.

New Instructors and Career Navigators must attend Train-the-Trainer sessions led by CareerWork\$.

Subject to review and approval by PARTNER4WORK, the BankWork\$® program positions defined in this section may be adjusted or customized by SUBRECIPIENT to meet the needs and standards of SUBRECIPIENT.

5. Promotion, Outreach and Recruitment

SUBRECIPIENT must coordinate closely with PARTNER4WORK in marketing and promotional implementation strategies. PARTNER4WORK will oversee the overall BankWork\$® Pittsburgh marketing and promotion strategy facilitated by SUBRECIPIENT. SUBRECIPIENT will implement a timeline, marketing collateral, and a website for interested candidates and employers to provide basic contact information.

SUBRECIPIENT will promote the BankWork\$® program utilizing marketing collateral approved by PARTNER4WORK and CareerWork\$. All collateral must be approved by PARTNER4WORK and CareerWork\$ prior to public distribution, as per the requirements of PARTNER4WORK's licensing agreement with CareerWork\$.

SUBRECIPIENT will include information about the BankWork\$® program on its website, post and distribute flyers and/or other approved collateral, and advertise about upcoming cohorts utilizing its social media platforms. SUBRECIPIENT may produce and post original social media content (e.g., Facebook posts, Tweets, etc.) to support recruitment efforts; however, PARTNER4WORK reserves the right to impose edits and/or deletion if content does not appropriately represent BankWork\$® Pittsburgh, PARTNER4WORK, or CareerWork\$. At all times, SUBRECIPIENT will adhere to the marketing and branding guidelines and approval process established by PARTNER4WORK.

SUBRECIPIENT will actively recruit qualified participants leveraging its own network of community partners as well as referrals from PARTNER4WORK, PA CareerLink®, WIOA and TANF-funded programs, and other workforce development and community-based programs throughout the region. SUBRECIPIENT will organize information sessions and pre-screening events throughout Allegheny County to promote the BankWork\$® program. Additionally, SUBRECIPIENT agrees to participate in other events organized by PARTNER4WORK and/or PA CareerLink® to promote BankWork\$® Pittsburgh.

Should PARTNER4WORK receive inquiries from interested candidates, PARTNER4WORK will send inquiries to SUBRECIPIENT, at which point SUBRECIPIENT will respond to the candidate with current and accurate information regarding program eligibility, the application and screening process, and upcoming training cohorts, as well as answering general questions about the BankWork\$® program. SUBRECIPIENT is expected to respond to all inquiries, whether from PARTNER4WORK or other referral sources, including self-referral, within two standard business days of receipt.

SUBRECIPIENT will direct all media, press, and public relationships inquiries regarding BankWork\$® Pittsburgh to PARTNER4WORK.

6. Screening and Assessment

SUBRECIPIENT will implement a triage and assessment process to determine eligibility and suitability for programming and will enroll only those individuals for whom this programming is appropriate. Refer to Section 3 above for a list of eligibility criteria. SUBRECIPIENT will align its screening and assessment process with the criteria and guidelines established by CareerWork\$ and PARTNER4WORK.

Prior to each training cohort, SUBRECIPIENT will host participant screening days during which SUBRECIPIENT will collect intake applications, conduct interviews, and administer TABE tests to all candidates, either directly or through partnerships with approved TABE providers. Where a participant has taken the TABE test in the past six months, SUBRECIPIENT is encouraged to utilize the TABE test results. SUBRECIPIENT will maintain records for all BankWork\$® applicants including all intake forms completed, interview notes, test scores, and outcome of screening (e.g., approval, denial, or addition to waitlist; referrals to other programs or services; etc.). SUBRECIPIENT will conduct criminal and

other background or credit checks on all participants prior to enrollment in the training program, as defined by PARTNER4WORK.

SUBRECIPIENT will further ensure that applicants not eligible or suitable for this programming are referred to other appropriate programs for further assessment and services, including PA CareerLink®.

For candidates who are job-ready and may be overqualified for BankWork\$® training, SUBRECIPIENT will coordinate with partner agencies, including PA CareerLink®, to directly place them into employment with local banks, as appropriate.

PARTNER4WORK may provide specific target populations for enrollment to SUBRECIPIENT prior to or during the enrollment period (e.g., residents of the Hill District, participants between 18-24 years old, etc.). In these cases, SUBRECIPIENT is expected to work closely with PARTNER4WORK to increase outreach efforts to priority populations.

7. WIOA Enrollment via PA CareerLink®

SUBRECIPIENT may be required to facilitate enrollment of eligible participants in services under the Workforce Innovation and Opportunity Act (WIOA) in close coordination with PA CareerLink®. PARTNER4WORK may make participation in the BankWork\$® program contingent upon WIOA enrollment for some or all participants.

When WIOA enrollment is required, PA CareerLink® will define all pre-enrollment steps, forms, and eligibility documentation required of SUBRECIPIENT and potential participants, which must be completed or collected within the timeframes defined by PA CareerLink® before PA CareerLink® conducts eligibility and suitability activities with potential participants. SUBRECIPIENT will work with PA CareerLink® to schedule WIOA eligibility and enrollment interviews for potential participants, as needed, to ensure such participants are eligible for WIOA services and suitable to participate in WIOA-funded training; and to ensure all required WIOA enrollment procedures are followed and participant information is entered into the PA CareerLink® system and the Commonwealth Workforce Development System (CWDS) in a timely manner. PA CareerLink® may also need to take additional steps to ensure participants are suitable for WIOA-funded training, including but not limited to completing specialized assessments or an Individual Employment Plan (IEP).

PA CareerLink® may choose to conduct eligibility and enrollment activities with potential participants in a group or individual format, through in-person or remote platforms. SUBRECIPIENT will make every effort to ensure arrangements are made with PA CareerLink® to conduct eligibility and suitability activities no later than ten (10) business days before the start of each training cohort for potential participants to be enrolled in WIOA.

If SUBRECIPIENT does not strictly abide by these requirements, or any additional requirements defined by PA CareerLink®, PA CareerLink® may not be able to effectively determine eligibility and suitability for potential participants.

Final WIOA eligibility and suitability determinations for participants will be made by staff members of PA CareerLink®, or other entities designated by PARTNER4WORK.

8. Training and Graduation Event

SUBRECIPIENT will deliver the BankWork\$® program at a location agreed upon in writing by PARTNER4WORK and SUBRECIPIENT. Upon request by PARTNER4WORK, SUBRECIPIENT will deliver the BankWork\$® program at locations determined by PARTNER4WORK, including but not limited to UPMC's Neighborhood Center in the East End of Pittsburgh and designated partner agencies located in the South Hills of Allegheny County. Cohort start dates for the period of performance described herein are to be determined by mutual agreement of PARTNER4WORK and SUBRECIPIENT.

SUBRECIPIENT will utilize the BankWork\$® curriculum to teach program participants the operational fundamentals of branch banking, the features and benefits of bank products and services, strong customer service and client engagement skills, and bank product/service sales and internal referral skills. Each training cohort will be eight weeks long and offered three days per week, enabling participants with part-time jobs to maintain employment throughout the program. SUBRECIPIENT will provide dedicated, consistent classroom space, instructional materials and audio-visual equipment, and regular access to on-site computers for the duration of each cohort.

SUBRECIPIENT will work closely with PARTNER4WORK to determine the end dates and graduation date for each cohort. Training will be delivered by the Instructor and co-facilitated by the Career Navigator; therefore, it is expected that both the Instructor and the Career Navigator will actively participate in all class sessions. SUBRECIPIENT will ensure adequate staff coverage for each class if either the Instructor or Career Navigator are absent. Should class be modified or canceled due to staff absences, inclement weather, or any other reason, SUBRECIPIENT will immediately notify all participants and PARTNER4WORK via phone and email. SUBRECIPIENT will ensure any canceled classes are promptly rescheduled and communicated to participants and PARTNER4WORK. SUBRECIPIENT will track participant attendance and completion.

SUBRECIPIENT will maintain constant fidelity to the BankWork\$® program. SUBRECIPIENT may supplement the BankWork\$® curriculum with additional learning content pending prior written approval by PARTNER4WORK. Additional content may be used to reinforce key concepts covered in the BankWork\$® program and may never be used to substitute, replace or contradict components of the BankWork\$® curriculum.

At the culmination of each training cohort, SUBRECIPIENT will organize and execute a combined graduation event and job fair, working in close coordination with PARTNER4WORK (see “Employer Engagement” below). SUBRECIPIENT will provide suitable space, staffing, and logistical support to ensure a successful event.

SUBRECIPIENT will maintain records of individual participants’ attendance at each scheduled day of training using daily sign-in sheets. Additionally, SUBRECIPIENT will maintain records of participant and employer attendance at the BankWork\$® graduation/job fair events.

9. Supportive Services

For each applicant enrolled in BankWork\$®, SUBRECIPIENT will conduct an initial needs assessment that will identify potential barriers to program completion, job placement, and retention. SUBRECIPIENT will then meet with each participant with identified barriers to create a supportive service plan. SUBRECIPIENT will offer a bus pass to each participant, based on individual needs, for the duration of the 8-week training program. SUBRECIPIENT will make all reasonable accommodations to ensure full access to the program for participants with disabilities or impairments. SUBRECIPIENT will track supportive services offered and provided to participants, as well as referrals made by SUBRECIPIENT to community resources. SUBRECIPIENT will provide supporting documentation to verify supportive services provided.

SUBRECIPIENT may provide stipends to participants, as long as amounts are clearly established in the budget for this Agreement and internal controls are established to ensure effective distribution and tracking.

SUBRECIPIENT will provide ongoing, customized one-on-one life skills/soft skills coaching and workshops designed to reinforce and supplement the BankWork\$® curriculum and to enhance participant’s work readiness. These services may include, but are not limited to, resume writing, mock interviewing, time management, financial literacy, and creating individual plans for post-employment success, such as creating contingency plans for transportation or childcare.

10. Job Placement and Follow-Up Services

SUBRECIPIENT will provide all participants with job search information including assistance completing on-line applications to individual banks, and will provide intensive support and coaching to participants who prove difficult to place. SUBRECIPIENT will work closely with PARTNER4WORK to build and enhance relationships with bank partner recruiters and promote candidacy of program participants to partner banks.

SUBRECIPIENT will assist all Bankwork\$® graduates with job searching toward the goal of placing job-ready candidates directly into employment with local banks. For those individuals unable to complete the program, SUBRECIPIENT will refer them to PA CareerLink® for further job search assistance. For those individuals unable to find a job within two weeks of program graduation, SUBRECIPIENT will coordinate with PA CareerLink® to provide additional job search assistance, as appropriate.

SUBRECIPIENT will provide follow-up services to all participants who complete the BankWork\$® program for one year following their date of graduation. SUBRECIPIENT will conduct a structured participant follow-up effort by reaching out to

placed program participants to monitor and document their progress and provide support to both participants and their employers. SUBRECIPIENT will produce regular reports indicating participant retention and career and salary progression.

11. Employer Engagement

PARTNER4WORK is leading the development of an Industry Partnership in the financial services sector composed of representatives of banks, credit unions, and other related employers with a footprint in Pittsburgh/Allegheny County. The BankWork\$® program is a critical initiative of this Industry Partnership.

PARTNER4WORK and SUBRECIPIENT will coordinate closely to promote the BankWork\$® program to employers in the region and meet with employers to identify their interest and capacity to participate in the BankWork\$® program, and to secure employers’ engagement through activities such as guest lectures, mock interview sessions, and attendance at graduation/job fair events. PARTNER4WORK and SUBRECIPIENT will collect employer feedback on the BankWork\$® program and will share findings and recommendations to guide future performance.

PARTNER4WORK recognizes that SUBRECIPIENT brings existing relationships with businesses in the financial services sector that may enhance and expand opportunities for BankWork\$® participants. To ensure a coordinated approach to employer engagement around BankWork\$®, SUBRECIPIENT agrees to participate in regular meetings with PARTNER4WORK to review business leads and manage employer relationships. Additionally, SUBRECIPIENT will refer interested employers to PARTNER4WORK for an initial consultation meeting to establish that employer’s hiring needs, interest in participating in BankWork\$®, and interest in participating in the broader Financial Services Industry Partnership.

12. Communication

SUBRECIPIENT will communicate regularly, through meetings and correspondence, with PARTNER4WORK and PA CareerLink® regarding program accomplishments, challenges, and lessons learned. SUBRECIPIENT will hold weekly conference calls and monthly meetings with PARTNER4WORK and PA CareerLink® to assess progress, problem solve, and refine program implementation. PARTNER4WORK will coordinate with BWork\$, LLC and facilitate communication between BWork\$, LLC and SUBRECIPIENT, as needed.

13. Outcomes

SUBRECIPIENT must meet or exceed the following goals during the term of any agreement resulting from this RFP.

Performance Indicator	Goal
Number of cohorts conducted during the period of January 1, 2023 to June 31, 2024. ⁴	6 total (1 per quarter)
Number of participants enrolled per cohort.	25
Number of total participants enrolled during the period of January 1, 2023 to June 31, 2024.	150
Percent of participants who complete the program.	85% of enrollments
Percent of participants who obtain employment within six months of graduation	80% of enrollments

PARTNER4WORK reserves the right to add any additional goals for SUBRECIPIENT.

Poor Performance: In the event SUBRECIPIENT’s performance does not result in the contract goals, PARTNER4WORK will work with SUBRECIPIENT to improve performance; however, especially in cases of chronic underperformance, PARTNER4WORK may implement corrective measures or terminate any agreement resulting from this RFP upon notice to SUBRECIPIENT.

⁴ Bidders may propose varying the number of cohorts and individuals within cohorts; however, the total number of participants served must not change. Any variation from this standard is subject to review and approval by Partner4Work.

14.Data Collection and Reporting

SUBRECIPIENT must regularly track and monitor data related to participation and outcomes, using observations and evaluations to ensure continuous program improvement. Such efforts must be supported by strong internal systems and applications. SUBRECIPIENT is required to provide PARTNER4WORK with timely reports and supporting documentation that clearly demonstrate program enrollment, participation, progress, outputs, and outcomes. PARTNER4WORK will work with SUBRECIPIENT to understand reporting requirements and program exiting procedures, and to determine the appropriate template for reporting outcomes and performance. Reporting frequency and content are subject to change at the discretion of PARTNER4WORK. SUBRECIPIENT may be required to utilize a reporting system or template proprietary to the BankWork\$® program.

15.Records and Documentation

SUBRECIPIENT must retain, secure and ensure the accuracy of all program files and records, whether related to participants, businesses or general operations, in compliance with 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: BankWork\$® application form, proof of age (e.g., birth certificate, state-issued ID, etc.), documentation of current address (e.g., state-issued ID, utility statement, postmarked mail, etc.), authorization to work in the United States (e.g., US Passport or state-issued ID, permanent residence card, etc.), criminal background records, TABE test results, any assessments conducted, regular customer contacts and updates, progress reports, time and attendance sheets, case notes, and, upon graduation from the program, a BankWork\$® program completion certificate. Files must be retained for SEVEN (7) years after PARTNER4WORK reports final expenditures to the funding source. SUBRECIPIENT must allow PARTNER4WORK and representatives of other regulatory authorities access to all records, program materials, staff, and participants.

SUBRECIPIENT 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 PARTNER4WORK 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. SUBRECIPIENT acknowledges that the use or disclosure of participant information for purposes other than the effective delivery of the services described in this STATEMENT OF WORK is strictly prohibited. Staff of SUBRECIPIENT may have access to this information only on a "need to know" basis. SUBRECIPIENT 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.

16.Contract Oversight and Evaluation

PARTNER4WORK is responsible for all levels of program monitoring, compliance and evaluation for the services delivered through this Agreement. SUBRECIPIENT will be required to keep good records and collect data that will help PARTNER4WORK comply with such requirements and sustain highly effective workforce development programming.

PARTNER4WORK Responsibilities: PARTNER4WORK will monitor, evaluate and provide guidance and direction to SUBRECIPIENT in the conduct of services performed under this STATEMENT OF WORK. PARTNER4WORK has the responsibility to determine whether SUBRECIPIENT has spent funds in accordance with applicable laws and regulations, including federal audit requirements and will monitor the activities of SUBRECIPIENT to ensure such requirements are met. PARTNER4WORK may require SUBRECIPIENT to take corrective action if deficiencies are found.

SUBRECIPIENT Responsibilities: SUBRECIPIENT will permit PARTNER4WORK to carry out monitoring and evaluation activities, including any performance measurement system required by applicable law, regulation, and funding source guidelines, and SUBRECIPIENT agrees to ensure, to the greatest extent possible, the cooperation of its agents, employees and board members in such monitoring and evaluation efforts. This provision shall survive the expiration or termination of any agreement resulting from this RFP.

SUBRECIPIENT shall cooperate fully with any reviews or audits of the activities under any agreement resulting from this

STATEMENT OF WORK by authorized representatives of PARTNER4WORK or federal or state agencies and SUBRECIPIENT agrees to ensure to the extent possible the cooperation of its agents, employees and board members in any such reviews and audits. This provision shall survive the expiration or termination of any agreement resulting from this RFP.

SUBRECIPIENT understands that all books and records pertaining to any agreement resulting from this RFP, including payroll and attendance records of participating employees, are subject to inspection by PARTNER4WORK, federal or state agencies and others for auditing, monitoring or investigating activities. Said books and records shall be maintained for a period of SEVEN (7) years beyond the completion of any agreement resulting from this RFP. If SUBRECIPIENT receives notice of any litigation or claim involving any agreement resulting from this RFP, SUBRECIPIENT shall retain records until otherwise instructed by PARTNER4WORK.

PROPOSAL PROCESS & REQUIREMENTS

This section provides instructions for preparing and submitting a proposal in response to this RFP, including required proposal content 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

Interested and qualified applicants must submit proposals by October 10, 2022 at 11:59pm ET to RFP@partner4work.org. Emails must have the subject line "BankWork\$ Pittsburgh Proposal [Organization name]." Late or incomplete proposals will not be considered. Proposals must be submitted in 11-point, Calibri font, double-spaced with 1-inch page margins. Your proposal may 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. (See Partner4Work’s webpage for this RFP)
2. **Executive Summary** – Include each of the following: (maximum 2 pages)
 - a. Overview of the organization’s qualifications and alignment with the services sought by this RFP.
 - b. Concise description of the proposed program.
 - c. The total amount of funding requested.
3. **Organization Description** – Describe each of the following for your organization: (maximum 2 pages)
 - a. Basic organizational description, including but not limited to year established, legal status, mission, principal programs and services, executive leadership, annual budget, and number of full-time staff.
 - b. Past experience in managing quality training and workforce development programs, especially those similar to the program described in this procurement, including related performance outcomes. Provide contact information for at least two past or current funders (other than Partner4Work) who can directly attest to the work you describe and verify your ability to serve customers, achieve deliverables, and meet performance goals similar to those required by this RFP. Partner4Work reserves the right to consider any previous performance data from workforce development programs.
 - 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 6 pages)

Applicants should directly respond to each of the sections below; however, strong responses will clearly demonstrate how the applicant will effectively meet all the standards, expectations, and outcomes found in this RFP. Proposals should outline the strategy proposed to meet the requirements described throughout this RFP.

 - a. Staffing plan: Describe your proposed staffing plan to support the programmatic, administrative, and executive components of the BankWork\$® program. You may propose the staffing model you deem

effective to meet the requirements described herein; however, your model must reflect the standards of the BankWork\$® program, as described throughout this RFP. In your response, be sure to address how you will accomplish the following:

- i. Coordinate with Partner4Work to recruit and employ highly qualified candidates for the BankWork\$® Program, including the Instructor and Career Navigator. Note: if your organization plans to designate an existing staff person as the Career Navigator or Program Instructor, you must attach a resume for that individual.
 - ii. Staffing plan for key positions supporting the BankWork\$® program, including titles, basic roles, responsibilities, and level of effort. Be sure to address how you will employ professional staff with the knowledge and expertise in the Statement of Work, and ensure a high level of staff performance, competency, and quality customer service. Partner4Work encourages applicants to ensure all staff members employed through any agreements resulting from this RFP receive a salary or wage of at least the Partner4Work self-sufficiency wage.⁵
 - iii. Maintain regular and clear communication between proposed staff and Partner4Work.
- b. **Performance goals:** Describe how your proposed program will meet the performance standards required by this RFP. At a minimum, proposals must include strategies for meeting the goals described in the Statement of Work, including number of cohorts, participants enrolled, completion of the program, and job placement. However, strong proposals will include additional goals set by applicants reflecting the standards and desired outcomes described in this RFP. Also, be sure to address how you will track performance and regularly communicate progress. If you are a provider who has not met performance goals of any prior Partner4Work contracts, address how you will ensure goals are met for this program.
- c. **Outreach, recruitment, and screening:** Describe your proposed strategies for reaching the populations described in this RFP and building an effective pipeline of training candidates. Strong responses will demonstrate the applicant's success in recruiting and serving the populations described in this RFP. Your response should clearly address each of the following components:
- i. Outreach and communications strategy to support recruitment of diverse individuals who are underrepresented in the banking sector, including those with barriers to employment.
 - ii. Screening process, including how you will assess interested participants to ensure BankWork\$® training is a strong fit and that candidates are likely to be successful in the program.
 - iii. Coordination of outreach and communications efforts with Partner4Work and other workforce development partners, such as PA CareerLink®.
Note: Although Partner4Work, PA CareerLink®, and other workforce development partners will promote and recruit for the program, it will be the responsibility of the successful applicant to reach enrollment and other goals of the contract.
- d. **Program delivery:** Describe your plan for delivering a BankWork\$® program that meets the standards and requirements described throughout this RFP. Your response should include the following:
- i. Proposed training locations, including characteristics of the space, and how location and space will provide access and support effective participation. Preference will be given to proposals that demonstrate effective strategies for delivering programs remotely or in neighborhood-based locations, and for proposals providing location flexibility. Be sure to include specific details about locations, accessibility for individuals with disabilities, and proximity to public transit routes.
 - ii. Plan for delivering high quality, engaging, hands-on training that aligns with BankWork\$® curriculum and program standards. See Appendix F for an overview of the BankWork\$® curriculum.
 - iii. Plan for eliminating barriers to participation for trainees, including strategies for assessing and meeting supportive service needs. You may propose providing stipends for participants, as long as amounts and arrangements are reasonable and well justified.
 - iv. Plan for delivering comprehensive career services tailored to the financial service industry, including a range of activities designed to help participants successfully prepare for job placement in the banking sector. Your response should address how your organization is prepared to help participants develop soft skills and specific occupational skills.

⁵ <https://www.partner4work.org/document/3rwib-self-sufficiency-policy/>

- v. How you will ensure quality job placement for participants of the program. Preference will be given to proposals that include evidence of employer commitment to hire individuals who have participated in the applicant’s programming, which can be demonstrated with employer MOUs or letters of support. Quality of job placement, in terms of wages, benefits, stability, advancement potential, and other factors will also be considered.
- vi. How you will provide follow-up services to support retention and advancement, mediate workplace issues, and address identified needs.
- e. Any other factors Partner4Work should consider in evaluating the strength of the proposal, including but not limited to additional services or resources available to participants, key partnerships providing value to BankWork\$®, or technologies enhancing the proposed program.

5. Program Costs/Budget – Provide a budget including all program and administrative costs, using the required budget template provided (see Partner4Work webpage for this RFP). Reference *Anticipated Award* in Section 1 of this RFP for a range of possible contract values.

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 requirements of the contract, while being realistic and reasonable, avoiding unnecessary or unusual expenditures. Refer to the appropriate regulations per the funding sources described in this RFP in conjunction with the Uniform Guidance to identify disallowed costs associated with this grant. See Appendix D 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, supportive services, space, equipment, general operations, technology, administration, indirect and any other necessary costs. A strong budget narrative will minimize or eliminate the need for clarifications from evaluators reading the proposal. See Appendix D for further guidance regarding the budget and budget narrative. If your proposal includes in-kind services or donations, including cash contributions, fee-for-service or other revenue generation, or any other leveraged resources, use the budget narrative to describe the actual or estimated value of such contributions. If applicable, also attach a letter of support from any organization providing leveraged resources in support of your proposal.

7. Attachments - Required attachments include contact information for at least two past or current funders (see *Organization Description*). MOUs or letters of support from employers are highly encouraged (see *Program Narrative, Program Delivery*). You may choose to include other attachments with your proposal; however, all attachments must specifically relate to your proposal. Examples include letters of support from important partners, a timeline or flowchart for your proposal, or a table illustrating past performance. Proposal readers may consider optional attachments in evaluating the proposed program, to the extent they strengthen the content of your proposal, as described herein. Attachments containing general information not directly relevant to the proposed program will not be considered. Attachments will not count toward the page limitations established in the above sections.

Review and Selection Process

All proposals received by the submission deadline will be initially reviewed by Partner4Work for completeness and compliance with this RFP. Proposals passing the initial review will be scored by qualified evaluators according to the criteria below, with attention to clarity, completeness and quality. High scoring proposals will clearly demonstrate an ability and likelihood to effectively perform the Statement of Work, deliver the proposed program, and meet the standards and intended outcomes of this RFP. Select applicants may be requested to participate in presentations or discussions with proposal evaluators and other Partner4Work staff. 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	
1 & 2. Cover Sheet and Executive Summary	Required, but not scored
3. Executive Summary	20 points
4. Program Narrative	60 points
5 & 6. Program Costs/Budget	20 points
7. Attachments	Used to support scores of related proposal sections
Total points available	100 points

The selected applicant 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):

Release of RFP:	September 8, 2022
Bidder’s conference:	September 28, 2022 at 11:00am ET
Questions regarding this RFP due:	September 30, 2022 at 11:59pm ET
Proposal due date:	October 10, 2022 at 11:59pm ET
Notification to bidders:	Late October or early November

Questions

All questions or requests for additional information must be made in writing to RFP@partner4work.org by September 30, 2022 at 11:59pm ET. Answers will be posted publicly at www.partner4work.org. Interested parties are encouraged to check the website frequently for updates. Questions received after September 30, 2022 at 11:59pm ET will not be answered.

Bidder’s Conference

Partner4Work intends to conduct a bidder’s conference on September 28, 2022 at 11:00am ET. However, Partner4Work reserves the right to cancel the bidder’s conference and will post notice of cancellation via the Partner4Work website if it chooses to do so.

Interested applicants are encouraged to attend the bidder’s conference. The conference will be conducted virtually and attendees must register no later than September 23, 2022 at 11:59pm ET by emailing RFP@partner4work.org and including organizational name and name(s) of attendee(s). Conference details and instructions will be sent to attendees upon registration. During the conference, Partner4Work staff intend to review the requirements of the RFP and proposal content. Questions may be posed during the bidder’s conference, but complete answers may not be available until a question/answer document is released following the conference. Interested applicants are encouraged to submit questions in advance of the bidder’s conference in writing to RFP@partner4work.org no later than September 23, 2022 at 11:59pm ET. Interested applicants should view the bidder’s conference and resulting question/answer document as opportunities to obtain guidance on the scope and nature of the work required in this RFP or to ask technical questions concerning this solicitation.

Disclaimers

- [Executive Order 2021-06, Worker Protection and Investment](#) must be followed throughout this RFP.
- 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 to 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.
- Applicants must be capable of agreeing to the requirements set forth in the Partner4Work contract templates, available at <https://www.partner4work.org/document/partner4work-contract-templates/>.

Appendix A – Request for Proposals Cover Sheet

See webpage for this RFP for fillable version of this form

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: Education Institution

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

Please provide your current [Unique Entity ID](#): _____

Please provide your current [CAGE Code](#): _____

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)
- Certificate of Liability Insurance; Including Cyber Security Coverage
- Most recent financial audit
- Certificate of Worker's Compensation Insurance
- W9

D. Additional Requirements

- Agree to Use Partner4Work's Contract Management Software, Parley Pro, for Contract Negotiation
- By submitting your proposal you certify that you are compliant with the following [PA state integrity policy](#). If you are not, please submit along with your proposal a written explanation of why such certification cannot be made.
- By submitting your proposal you acknowledge and agree to abide by the payment provisions described in this RFP, which will apply to any agreements resulting from this RFP.

Appendix B – BankWork\$® Position Descriptions

Below are descriptions for two positions required by the BankWork\$® program - Instructor and Career Navigator. See the Statement of Work for more information. Applicants must submit proposals that include these two positions; however, applicants are not limited in proposing only these positions. Applicants should submit proposals with staffing models they deem appropriate for meeting the requirements of this RFP.

Subject to review and approval by Partner4Work, the below position descriptions may be adjusted or customized to meet the needs and standards of the hiring organization.

BankWork\$® Instructor Job Description

Note: This position description is subject to change.

The BankWork\$® Instructor's primary responsibility is to provide program participants with the knowledge, skill set, and mindset required to begin a career in banking/financial services. Utilizing the BankWork\$® curriculum content and related program materials, teach the program participants the operational fundamentals of branch banking, the features and benefits of bank products and services, strong customer service and client engagement skills, and bank product/service sales and internal referral skills. Provide group and one on one coaching and mentoring to ensure each program participant has the competence and confidence to present themselves as a qualified and committed candidate for entry level teller, customer service representative, and/or personal banker positions. Work closely with bank partners to ensure that we are aware of any changes in branch functional roles/positions, desired innate and learned abilities to make sure our graduates are meeting the evolving needs of our bank partners.

- Develop strong relationships with banks, other financial services organizations, job placement agencies, organizations serving veterans/transitioning military and spouses, community organizations and faith based organizations, social media, and all other avenues that can serve as a source for BankWork\$® program participants.
- Interview program candidates and administer assessments to determine eligibility for the program. Identify specific areas for individual coaching and mentoring during the course of the program.
- Develop and sustain strong relationships with retail recruiters and line managers at partner banks to ensure pro-active participation in our job fairs, and prioritize BankWork\$® as a source of candidates for job openings within the banks.
- Provide program participants with individual and group training on all job search related skills; resume, cover letter, online and hard copy employment applications, keys to an effective interview, appropriate attire, timeliness, and follow up.
- Plan and execute a formal graduation and job fair for each session.
- Present graduates to bank partners to optimize placement results.
- Accurately collect, record, analyze, and report/submit all required program and program participant performance data to the national CareerWork\$ team and other program stakeholders.
- Provide feedback to CareerWork\$ regarding suggestions on updating and enhancing the program curriculum and all program materials.
- Manage the collection and maintenance of personal/background documentation, contracts and progress reports of program participants.
- Provide supervision to other program personnel as appropriate.

Education and Experience

- A Bachelor's degree or equivalent professional experience required.
- Minimum of 5 years of experience working in retail banking.
- Minimum 3 years of professional adult training experience (trainer, teacher, instructor, or educator).

Knowledge, Skills and Abilities

- Demonstrated ability to effectively interact with multicultural and diverse individuals with barriers to employment; strengths-based mindset and cultural competence is a must.
- Excellent oral and written communication skills with the ability to implement a highly interactive and engaging

classroom experience; awareness of best practices for teaching adult learners.

- Experience in recruiting, assessing, enrolling, career coaching and placing participants/clients.
- Strong customer service orientation and results orientation. Demonstrated sales skills.
- Proficient in use of Windows, Word, Excel and Outlook.
- Familiarity with online training platforms and models.
- Team player with ability to collaborate effectively with partners and stakeholders.
- Skilled at problem solving and project management.
- Ability to execute events; strong logistical and organizational skills.
- Professionalism and strong work ethic.
- Must have reliable access to transportation and ability to travel locally and regionally.
- Additionally, must be available to attend Train-the-Trainer sessions offered by CareerWork\$.

BankWork\$® Career Navigator Job Description

Note: This position description is subject to change.

The BankWork\$® Career Navigator's primary responsibility is to provide employment preparation, job placement support and retention support to BankWork\$® program participants. This position will also provide business outreach to all local banks to develop job opportunities for graduates by cultivating and maintaining relationships with bank recruiters and managers. As a member of the BankWork\$® team, the Career Navigator will participate in the marketing of the program and assist in the recruitment and selection of candidates.

Placement and Retention

- Coach students in developing job skills, resumes, cover letters, etc., and provide students with job search information including assistance completing on-line applications to individual banks.
- Maximize placement of program graduates in banking positions at banks and financial institutions.
- Provide intensive support and coaching to participants who prove difficult to place.
- Build relationships with bank recruiters and promote candidacy of program participants to partner banks.
- Show demonstrated ability to interact with people of different cultures and backgrounds.

Post-employment support

- Conduct structured participant follow-up by reaching out to placed participants to monitor their progress.
- Provide appropriate coaching and support to maximize job retention of program participants.
- Produce regular reports indicating participant retention and career and salary progression.

Marketing Outreach

- Work with community partners to recruit and screen applicants for program services.
- Interview candidates for enrollment and administer selection process to determine eligibility.

Additional Program Support

- Train with BankWork\$® Instructor to be able to deliver the curriculum as needed.
- Work with BankWork\$® national team on curriculum update process and training new partners in other markets.

Education and Experience

- 3+ years experience in employment services, human resources, social services or other related field.
- Background in retail branch banking is preferred.
- Experience working with multicultural and/or disadvantaged populations.

Knowledge, Skills and Abilities

- Demonstrated ability to effectively interact with multicultural and diverse individuals with barriers to employment; strengths-based mindset and cultural competence is a must.
- Excellent oral and written communication skills.
- Strong interpersonal skills and ability to demonstrate corporate professionalism.
- Experience in recruiting, assessing, enrolling, career coaching and placing participants/clients.

- Strong customer service orientation and results orientation. Demonstrated sales skills.
- Proficient in use of Windows, Word, Excel and Outlook.
- Team player with ability to collaborate effectively with partners and stakeholders.
- Skilled at problem solving and project management.
- Ability to execute events; strong logistical and organizational skills.
- Professionalism and strong work ethic.
- Must have reliable access to transportation and ability to travel locally and regionally.

Appendix C – Administrative 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 on the basis of 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 on the basis of 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.

Links to Relevant Fiscal and Program Policies and Regulations

[2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#)

[Pennsylvania Workforce System Policy 3-2015 Financial Management Policy](#)

[Pennsylvania Solicitation of Funds for Charitable Purposes Act](#)

[Workforce Innovation and Opportunity Act](#)

[US Dept of Labor Employment and Training Administration WIOA Related Advisories](#)

[Pennsylvania Dept of Labor and Industry Workforce System Directives](#)

Appendix D – Budget Narrative Instructions

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

Use the following guidance for preparing 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 time devoted to the project, the amount of each position's salary funded by the grant, 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 we are able to determine whether the costs are necessary, reasonable and allocable. List any item, such as stipends or incentives, 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. Participant support costs are defined below.

2 CFR 200.75 Participant Support Cost means direct costs for items such as stipends or subsistence allowances, 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>.

Appendix E – Program Partner Roles

BankWork\$® Partner Roles and Responsibilities	
BankWork\$® National	<ul style="list-style-type: none"> ● Support the Pittsburgh program launch, including facilitating Train the Trainer sessions ● Provide the curriculum content and all supporting tools and documents ● Track monthly metrics and annual detailed metrics at the national level ● Provide regular operational support and share best practices from other markets ● Support fundraising efforts
Partner4Work	<ul style="list-style-type: none"> ● Facilitate regional Financial Services Industry Partnership ● Serve as liaison to financial institutions participating in BankWork\$® ● Oversee fund development strategies and initiatives ● Oversee local marketing and recruitment efforts ● Procure and monitor sub-contracted program provider(s) ● Advise on sourcing of key BankWork\$® staff (e.g., Instructor, Career Navigator) ● Evaluate program and report outcomes to with BankWork\$® national team ● Identify sites and partners for program expansion
PA Bankers Association	<ul style="list-style-type: none"> ● Liaison with national BankWork\$® and Partner4Work to expand in Pittsburgh ● Recruit/encourage PA Bankers’ members to participate in Pittsburgh BankWork\$® expansion ● Promote the BankWork\$® program across Pennsylvania ● Serve as a resource to Partner4Work’s Financial Services Industry Partnership
Contracted Program Provider	<ul style="list-style-type: none"> ● Provide physical space, staffing, and operational capacity for BankWork\$® program ● Recruit, screen and enroll students ● Source key BankWork\$® staff (e.g., Instructor, Career Navigator), working in close collaboration with Partner4Work ● Provide instruction, coaching, support services, job placement support and other BankWork\$® program components ● Deliver key participant outcomes for BankWork\$® participants ● Host graduation and job fair event ● Track and report program data to Partner4Work

OUR CURRICULUM IS COMPREHENSIVE



Our unique hybrid delivery model teaches career-building, hard skills for on-the-job success in banking, and the soft skills needed to succeed as a professional anywhere.



In-person Graduation and Job Fair (Online during pandemic)

