



**The Chicago Cook  
Workforce Partnership  
Business Intermediary Services  
WIA Pre-Submittal Conference**

**October 11, 2012**

# Agenda

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- ❖ *Welcome and Overview*
  - ❖ *Introduction of Staff*
  - ❖ *Mission/Goals of The Partnership*
- ❖ *General Proposal Requirements*
- ❖ *Specific Program Designs*
- ❖ *Budget and Fiscal Submissions*
- ❖ *Submittal Procedure*
- ❖ *Question and Answers*

# What is the Chicago Cook Workforce Partnership?

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- ❖ *The Partnership is the successor agency to the Chicago Workforce Investment Council (CWIC) – the City’s workforce policy and strategy-making organization. The Partnership will replace the three administrative agencies that oversee federal workforce development funds and programs throughout Cook County and the City of Chicago (the Chicago Department of Family & Support Services (DFSS), the Northern Cook Workforce Board and Cook County Works (CCW)).*
- ❖ *The Partnership will now serve these functions. The reconfiguration will, therefore, improve the quality of service for residents and businesses, as they will be easily able to seek services across LWIA borders. Moreover, the new consistency throughout the region will positively impact local business access to the labor force.*

# Mission

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- ❖ *The Chicago Cook Workforce Partnership (“The Partnership”) aims to improve workforce development services, reduce costs and support job creation and economic development across the Cook County.*
- ❖ *The Partnership will create and support innovative programs that allow for region-wide implementation of best practices and coordinated engagement with the region’s business community in order to meet the workforce needs of employers and job seekers.*

# Key Efforts

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- ❖ *Reduce administrative costs, diversify funding, and develop regionally consistent strategies to increase funds available for servicing businesses and residents.*
  - ❖ *-Streamline training focus through LMI and other data*
  - ❖ *-Create consistent intake/assessment and case management processes*
  - ❖ *-Create more relevant performance measures*
  - ❖ *-Streamline training provider network*
  - ❖ *-Uniform RFP process*
  
- ❖ *Create governance structure that focuses key discussions on strategy (vs. process and administration) and encourages innovative use of programming/funding*
  
- ❖ *Work closely with businesses to discern high-demand employment areas, and build new programs to meet these needs by identifying, training and placing workers.*
  - ❖ *-Expand use of OJT*
  - ❖ *-Create programs for/in conjunction with specific businesses/ industry sectors.*

# Key Efforts continued . . .

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- ❖ *Link workforce development with economic development projects region-wide*
- ❖ *Utilize advanced technology to: create universal assessment tool; house central repository for program and employment resources; collect and disseminate data to all stakeholders; assess performance.*

# Business Intermediary Overview

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## GENERAL PROPOSAL REQUIREMENTS

# RFP Overview

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## *Six (6) RFPs Released*

- ❖ *Adult and/or Dislocated Worker Affiliates*
- ❖ *Bridge Programs*
- ❖ *Business Intermediary*
- ❖ *Sector Centers*
- ❖ *Workforce Centers*
- ❖ *Youth Affiliates*



# Industry Sectors/Business Relations

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## **Sectors:**

- ❖ *Transportation, Distribution and Logistics (TDL)*
- ❖ *Hospitality*
- ❖ *Healthcare*
- ❖ *Business and Professional Services*
- ❖ *Information Technology*
- ❖ *Manufacturing*
- ❖ *Retail*

## **Business Relations & Economic Development Unit**

- ❖ *Identifying opportunities to provide innovative, quality and integrated services to employers*
- ❖ *Creating a system-wide approach for continuity of business services*
- ❖ *Intermediaries must work closely the BRED Unit*

# General Submission Requirements

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## *Eligible Respondents:*

- ❖ *Any governmental, not, for profit, local agency, educational institutions or for profit entity;*
- ❖ *Properly operating in accordance with Federal, State and local law for at least three years;*
- ❖ *Direct service location in Cook County.*
- ❖ *Collaborations must:*
  - ❖ *Identify lead agency*
  - ❖ *State roles and responsibilities of each collaborator*
  - ❖ *Include an organizational chart for the collaboration*
  - ❖ *Describe how funds will flow within the collaborative*
  - ❖ *Identify the qualified fiscal agent*

# General Submission Requirements

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## ❖ Ineligible Respondents:

- 1) currently barred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in the this transaction by a Federal or State department/agency;*
- 2) have existing grants with any State, City or County agency that are suspended or otherwise not in good standing;*
- 3) are not in compliance with the Illinois Department of Revenue or the Federal Internal Revenue Service requirements.*

# Available Funding and Time Period

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## ***Period of Performance***

*January 1, 2013 - December 31, 2013*

*With option to renew*

## ***Estimated Available Funds (12 months)***

<b>FUNDING YEAR</b>	<b>Anticipated Allocation</b>
Program Year 2012	\$1,750,000
Program Year 2013	\$1,750,000

# Evaluation and Selection Process

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- ❖ *Proposal Review: Team of reviewers, may include WIB members or outside volunteers*
- ❖ *Fiscal Review: assessing entity's fiscal capacity, leveraged resources and program cost-effectiveness*
- ❖ *Past Performance Review*
- ❖ *Recommendations to committees of the LWIB*
- ❖ *LWIB recommendations*

# Evaluation Criteria

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<b>Category</b>	<b>Points</b>
Experience	25
Program Design	25
Past Performance and Project Support/Partnerships	25
Financial Structure and Cost Effectiveness	25
<b>Total</b>	<b>100</b>

# Business Intermediary Overview

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*SPECIFIC PROGRAM REQUIREMENTS*

# Relevant WIA Program Elements

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## ❖ Eligible Adult customers must:

- ❖ *Be 18 years of age or older;*
- ❖ *Be a United States citizen or eligible non-citizen; and,*
- ❖ *Comply with Selective Service (males only) legislation by providing documents to demonstrate compliance*

## ❖ Eligible Dislocated Workers must be:

- ❖ *Terminated or laid off, or have received notice of termination and is eligible for or has exhausted entitlement to unemployment compensation; and*
- ❖ *Unlikely to return to prior industry or occupation; and*
- ❖ *Laid off or terminated due to plant closure or substantial layoff; or*
- ❖ *Formerly self-employed or unemployed; or*
- ❖ *A displaced homemaker who has been providing unpaid services to family members in the home*



# Services to Job Seekers / Individual Customers

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- ❖ *At least 60% of candidates served by the Business Intermediary will be comprised of referrals from The Partnership, or its delegate agencies*
- ❖ *All customers accessing training services must be determined WIA eligible and must complete an assessment*
- ❖ *The Partnership (and its delegates) shall be responsible for screening its referred job seekers in accordance with the job specifications*

# Training Services

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## ***ALL Training Services MUST derive from an express employer need***

- ❖ *Occupational Classroom Training – Individual Training Accounts provided to those who have met eligibility criteria for intensive services, received at least one core and one intensive service but are still unable to obtain or retain employment*
- ❖ *On-the-Job Training (OJT) – provides targeted work experiences to prepare customers for a new job opportunity with a high likelihood of continued employment. And, provides increased education and broadens skill sets for individual customers*
- ❖ *Customized Training– designed to meet special requirements of an employer (or group of employers) conducted with a commitment to employ and individual on successful completion of training*

# Program Requirements

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## ❖ *Supportive Services*

- ❖ *Supportive services are intended to enable an individual to participate in program activities and to secure and retain employment*

## ❖ *Case Management*

- ❖ *Required as a critical element to ensure all individuals are receiving individualized career counseling*
- ❖ *Should be structured to maximize the employment potential of the individual by implementing job attainment and retention strategies*
- ❖ *Must contain an ongoing assessment component, evaluate basic skills and employment barriers to provide strong employment planning*

# Job Retention / Follow-up

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- ❖ *Assist WIA-registered customers and their respective employers with job retention*
- ❖ *Help customers placed into jobs remove any barriers to success and ensure progress toward long-term employment and self sufficiency*
- ❖ *Activities should include frequent contact with the customer and employer*

# Business and Employer Services

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- ❖ *Defined strategies that have demonstrated effectiveness in contacting area businesses to develop and maintain partnerships*
- ❖ *A business and employer services model that is result driven against a spectrum of services from self-access to enhanced recruitment, screening and training collaboration*
- ❖ *A broad understanding of the local industry sector strategy and a plan of action that is in accord with the sectors*
- ❖ *A comprehensive and diverse talent pool available to the employers seeking candidates*

# Business and Employer Services *(Continued)*

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- ❖ *A set of tools for understanding and evaluating the immediate and future needs of the employer*
- ❖ *An ability to identify qualified workers to provide the business community with a well-trained and job ready workforce*
- ❖ *An array of customized training and OJT opportunities to address the skills gap*
- ❖ *Ensuring effective job-matching and placement through a defined continuous improvement strategy*

# Job Seeker Population Defined

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- ❖ *General public seeking workforce services; with preference being given to veterans*
- ❖ *Adults and Dislocated Workers*
- ❖ *Individuals who meet the requirements for WIA*
- ❖ *Other individuals in need of specialized services such as the re-entry population, veterans, individuals with multiple barriers, limited English proficient, older adults and those with disabilities*

# Marketing and Community Outreach /Engagement

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- ❖ *Establish a strong communication plan and marketing strategy for all customers, employers and community groups*
- ❖ *Develop a positive, clear and consistent message to the community and key stakeholders*
- ❖ *Establish a contact strategy for all local businesses and delegate agencies and job seekers*
- ❖ *Promote customer success stories to workforce partners and the community at large*



# Accountability and Performance

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- ❖ *Define the quantifiable outcomes and demonstrate services are delivered through performance goals and benchmarks*
- ❖ *Develop and maintaining systems that define how performance measures will be achieved*
- ❖ *Identify ways to measure success of the program elements, marketing and outreach strategies*
- ❖ *Establish a continuous evaluation mechanism to monitor program effectiveness across every design element*

# Accountability and Performance

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## ***ALL Business Intermediaries must report***

- ❖ *Training-aligned placements in the sectors identified*
- ❖ *Job retention for one year following placement*
- ❖ *Net wage increase (over immediately previous employment)*
- ❖ *Industry-recognized credentials attained*
- ❖ *Total number of job placements to total number of job orders*
- ❖ *Percentage of delegate agency referrals placed*

# Specific Program Requirements: Performance Measures

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<b>Performance Measure</b>	<b>Estimated PY 2012 Goal</b>	<b>Meeting Range</b>
Adult Entered Employment Rate	75%	74.9% to 60%
Adult Employment Retention Rate	82%	81.9%-65.6%
Adult Average Earnings (6 mo.)	\$12,000	\$11,999-\$9,600
Dislocated Worker Entered Employment Rate	84%	83.9%-67.2%
Dislocated Worker Employment Retention Rate	89%	88.9%-71.2%
Dislocated Worker Average Earning Rate (6 mo.)	\$16,500	\$16,499-\$13,200

# RFP Overview

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## BUDGET & FISCAL REQUIREMENTS

# Budget Forms and Fiscal Requirements

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## Budgets

- ❖ *Budget Forms – Consists of Budget instructions, Budget forms, and a Budget Narrative. Detail all personnel and non-personnel costs associated with WIA-related programs, as well as the portion of costs being requested to be provided by The Partnership.*

# Budget Forms and Fiscal Requirements

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## **Required Federal, State and Regulatory Reportings**

- ❖ *Audited Financial Statements and Management Letter*
- ❖ *Federal and State Tax Returns*

## **Other Required Reportings**

- ❖ *Financial Statements – If an Independent Audit is not required, please provide a Balance Sheet (SOFP), Income Statement (SOA), SOCF & SFE.*
- ❖ *Certificate of Good Standing*
- ❖ *Fiscal Questionnaire – Basic Questions regarding Agency Internal Controls*
- ❖ *Stand-in Contribution Worksheet – Must be cash disbursements for costs allowable for WIA programs, but paid from non-federal funds.*

# Fiscal Checklist

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- ❖ ***One (1) copy per organization***
  
- ❖ ***Must be packaged in this order only:***
  - *Audited Financial Statements and Management Letter (if required)*
  - *Federal and State Tax Returns*
  - *Financial Statements (if Audit not required)*
  - *Certificate of Good Standing*
  - *Fiscal Questionnaire*
  - *Stand In Contribution Worksheet*

# RFP Overview

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## SUBMITTAL OVERVIEW



# Submittal Overview

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- ❖ *Submittal Procedures*
- ❖ *Application Checklist*
- ❖ *Proposal Package*

# Submittal Procedures

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*All proposals must be submitted in **BOTH electronic and paper form:***

- ❖ ***ONE ORIGINAL AND FOUR COPIES***
- ❖ *One complete proposal containing original signatures in **blue ink** signed by the President, CEO or equivalent of the organization and marked “Original.”*
- ❖ *A maximum of 20 pages excluding the Executive Summary and Appendices*
- ❖ *8 1/2 x 11 letter size paper*
- ❖ *Single-sided printing*
- ❖ *One inch margins*

# Submittal Procedures continued . . .

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- ❖ *Double-spaced*
- ❖ *12-point font*
- ❖ *Each section of the proposal bound separately i.e. appendices bound separately from narrative*
- ❖ *Bind on the left side with a 2 hole punch and a sliding clasp*
- ❖ *Proposals must be submitted on a USB flash drive or CD with Executive Summary and question responses saved as an MS Word file*
- ❖ *Fiscal and budget documents saved as an MS Excel file*

# Sample Application Checklist

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Submit one (1) original and four ( 4) copies of this checklist along with its contents.

- Original
- Copy \_\_\_ of 4

## Sector Center Application Checklist

LOG # \_\_\_\_\_

Sector Center Location: \_\_\_\_\_ Agency \_\_\_\_\_

The documents submitted for this application must be packaged in the same order as the checklist below.

1

- Agency Information Form
- Executive Summary (specific to this Sector Center Application)
- Sector Center Application Narrative (specific to this Sector Center Application)

2

- 1A Budget
- 1A Budget Narrative
- 1D Budget
- 1D Budget Narrative
- Organizational Chart
- Memorandum of Understanding (MOU) with partners

3

- Draft Subcontract (if applying with subcontractors)
- Job Titles and Descriptions
- Resumes Organized by Job Title
- List of employees proposed for the WIA project and their length of time employed by the respondent
- List of Board Members (including their addresses)
- Map of Service Location
- Agency Declaration

# Fiscal Checklist

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- ❖ **One (1) copy per organization**
- ❖ **Must be packaged in this order only:**
  - Audited Financial Statements and Management Letter (if required)
  - Federal and State Tax Returns
  - Financial Statements (if Audit not required by State Law)
  - Certificate of Good Standing
  - Fiscal Questionnaire
  - Stand In Contribution Worksheet

# Proposal Package

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Each package (envelope) **MUST** identify the type of proposal being submitted

**Ex:** Proposal for *Workforce Center*  
Identify location of center  
Date of submission  
Name of respondent  
Package \_\_\_ of \_\_\_

**Delivered to:** Illona Sheffey-Rawlings, CAO/General Counsel  
c/o The Chicago Cook Workforce Partnership  
69 W. Washington, Suite 2860  
Chicago, IL 60602

# RFP Corrections/Revisions

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Any corrections/revisions will be posted to

[www.workforceboard.org](http://www.workforceboard.org)

Respondents MUST check the website for any updates

# Questions and Answers

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Responses to all questions received by The Partnership prior to October 15, 2012 will be posted on its website at [www.workforceboard.org](http://www.workforceboard.org) by close of business October 18, 2012.

[BusinessRFP@workforceboard.org](mailto:BusinessRFP@workforceboard.org)



# DEADLINE

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**October 24, 2012**

**DUE no later than 12:00 p.m. CST**

**69 W. Washington, Suite 2860**

**Late Responses will NOT be accepted!!!**

# Questions and Answers

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