

# CHICAGO COOK WORKFORCE PARTNERSHIP

REQUEST FOR PROPOSALS FOR

## Career Opportunities in Retail: Workforce Board Collaborative



CHICAGO COOK  
WORKFORCE  
PARTNERSHIP

CHICAGO COOK WORKFORCE PARTNERSHIP  
69 W. WASHINGTON – SUITE 2860  
CHICAGO, IL 60602

**RESPONSES DUE:**  
January 29, 2015 – 4:00 P.M. (Central Time)

**Karin M. Norington-Reaves, CEO**  
Chicago Cook Workforce Partnership

**Dr. Ken Ender**  
Co-Chair

**Frank Clark**  
Co-Chair

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## **SECTION I. INTRODUCTION AND PROJECT SCOPE**

The Chicago Cook Workforce Partnership (The Partnership) is issuing a Request for Proposal (RFP) for local workforce development boards (LWDBs) to institute and operate retail sector strategies in their region. Successful applicants will join a new national network committed to improving career opportunities in retail. Federally designated local workforce development boards are the only entities eligible for this opportunity.

### **The Chicago Cook Workforce Partnership**

The Chicago Cook Workforce Partnership (The Partnership) is the nation's second-largest workforce development board (WDB), administering over \$40 million in Workforce Innovation and Opportunity Act (WIOA) funding throughout Chicago and Cook County. Our mission is to create, promote, and effectively manage a network of workforce development organizations that:

- Designs innovative solutions to address business needs, and,
- Prepares individuals for, and connects them to, career opportunities.

Our vision is that every person has the opportunity to build a career; and every business has the talent to grow and compete in a global economy. We work toward achieving that vision in part by implementing robust sector-based workforce strategies, including delivering WIOA services through four "sector centers" which focus on employer customers in high demand industries including manufacturing, information technology, and hospitality.

### **Problem Statement: Unmet Need in the Retail Sector**

The retail sector is tremendously important to our national economy. Retail supports one in four American jobs - a total of 42 million. This number includes not only direct retail roles, but millions of positions in logistics; management and administration; healthcare and service; finance, insurance and real estate; and IT. The industry represented 16% of the US GDP in 2012. These numbers are only expected to grow. Employers in the retail sector consistently report problems finding the right talent to fill positions, with 21% of retail companies in the Accenture Middle Skills Survey citing a lack of adequate middle skills talent, and 47% of retailers citing deficits in work ethic and ambition as the leading impediment to finding this talent. The fastest growing retail subsectors are in online and mobile -based retailing, a shift that will demand even more skilled workers. The retail industry presents a variety of exciting career paths, from customer service and sales to merchandising and buying, to logistics and management.

Despite the employment opportunities evident in retail, for many the phrase "retail job" conjures up an image of working at a cash register for minimum wage. The workforce development system occupies a unique position that allows us to combat that perception and place individuals into career pathways in the industry. We can achieve this by identifying clear entry points, building key partnerships with education and training providers to help individuals attain appropriate credentials, and changing perceptions by promoting exciting opportunities and successes in the industry. Through this initiative, we seek to address challenges, including seasonal and temporary hiring, low wages in entry level sales jobs, lack of clear advancement pathways or growth opportunities for workers, and lack of employer recognition for retailing or customer service credentials. Addressing these challenges requires a coordinated national workforce response in collaboration with retail and related employers.

The Chicago Cook Workforce Partnership, with support from The Walmart Foundation, seeks to strengthen the public workforce development system's retail sector focus and to improve the perception of careers in retail, both locally and nationally. Selected LWDBs will receive funding to implement unique local workforce initiatives in retail, while working collectively to improve the perception of retail careers nationwide.

## **Scope of Work**

Through a grant awarded by the Walmart Foundation, The Chicago Cook Workforce Partnership will make sub-awards to 8-10 WDBs across the nation to carry out local retail initiatives and take part in the coordinated national effort. The WDB sub-grantees will serve as national network that will:

- Improve the perception of retail careers among jobseekers by demonstrating the varied career pathways and opportunities for advancement to be found in the sector
- Improve employers' understanding of, and infrastructure for, advancing entry level employees along these pathways.
- Share successes, challenges and best or promising practices among each other with regard to recruitment, training, curriculum development, and other areas

Each applicant's proposal should be uniquely suited to its local economy and needs. Each applicant should conduct an assessment of the regional demand for retail occupations and identify emerging skills needs in the sector. Based on the results of this analysis, applicant WDBs should propose local initiatives that address these needs. Initiatives may include some combination of the following elements:

- Physical sites dedicated to providing workforce services in the retail sector
- Jobseeker assessments and recommendations for further training and job preparation
- Job readiness training customized to the retail sector, including helping jobseekers acquire workplace basics (soft skills) such as teamwork, leadership, working in fast paced environments, problem solving, communication, and conflict resolution, that are critical for workplace success
- Core skills training specific to the retail sector, including customer service, TDL, information technology (retail marketing, cybersecurity, e-tailing), mathematics, merchandizing, management, etc. that lead to industry recognized credentials
- Resume writing and interviewing workshops
- Incumbent worker training for the existing retail workforce
- Customized recruiting, screening and/or training to address employer demand or local workforce needs
- Training subsidies via the On-the-Job Training initiatives
- Career pathway initiatives aimed at advancing workers along the path to higher wages, more responsibility, and increased job security
- Assistance for employers with identifying and formalizing promotion pathways within the workplace
- A focus on retail, customer service, transportation/distribution/logistics, or other occupations related to retail
- Marketing efforts aimed at jobseekers to promote opportunities in retail and related fields
- Marketing efforts aimed at improving the public perception of retail; develop a retail industry business services communication plan
- Recruitment events, including hiring events or job fairs
- Post placement services to foster job retention and advancement
- Tools for linking employers to government incentives and business services
- Facilitation of reasonable accommodation for individuals with disabilities at the workplace
- Retail business advisory council, partnership with local retail industry associations, quarterly roundtables to ensure employer perspectives inform local programming

The Partnership will provide all sub-awardees with technical assistance, industry and labor market information, and other support/guidance as needed. We will facilitate annual conferences as well as regular conference calls and webinars. We will elevate project successes by publishing and disseminating case studies and success stories. We also provide access to the Walmart Foundation's Retail Community of Practice, a network of Walmart grantees currently facilitated by the Hope Street Group.

**Project Goals, Reporting, and Evaluation**

Overall project goals will depend upon the nature of each applicant WDB’s proposal, including scope and nature of proposed projects, as well as local demand. We will work with individual sub-awardees to define project goals. Each sub-awardee will be expected to leverage the WIOA system, and propose goals for WIOA registration, training, job placement, wages, and retention in addition to overall project goals. Sub-awardees must track all participants and report to The Partnership on all agreed-upon metrics.

*Table 1: Preliminary Metrics (these may evolve over time)*

Metric	Definition
Enrollment	<ul style="list-style-type: none"> <li>• <b>Number of individuals</b> enrolled in the program</li> <li>• <b>Basic demographics</b> and pre-program employment status</li> </ul>
Services (for Business and Job Seekers)	<ul style="list-style-type: none"> <li>• <b>Services for individuals</b> (for example: coaching, training, OJT, wrap around services, hard and soft skills training, retention services)</li> <li>• <b>Number of individuals</b> who completed each service, as per enrollment plans and “completion” definition OR number of individuals who passed skill/certification/competency test (if applicable)</li> <li>• <b>Services for businesses</b> (for example: pre-screening, customized training, incumbent worker training, retention/mediation services)</li> <li>• <b>Number of businesses</b> served by each service</li> </ul>
Job placement	<ul style="list-style-type: none"> <li>• <b>Number of individuals</b> placed in retail, transportation, distribution, logistics, and customer service jobs, by job “level” (i.e. entry-level or mid-level job)</li> <li>• <b>Type of employment</b> (for example: full-time, part-time, apprenticeship, temporary, or self-employment; average wage 180 days post-placement)</li> <li>• <b>Employment retention</b> after 30, 60, 90+ days</li> <li>• <b>Employee’s perception</b> of the level of economic improvement following the completion of the program (The Partnership will develop and disseminate the measurement tool to grantees)</li> <li>• <b>Employee’s confidence level</b> as it relates to future job prospects (The Partnership will develop and disseminate the measurement tool to grantees)</li> </ul>
Advancement	<p>The Partnership will develop and disseminate measures that will contain one or more of the following:</p> <ul style="list-style-type: none"> <li>• <b>Number of individuals</b> who are promoted after receiving one or more services,</li> <li>• <b>Number of individuals</b> who advanced from part-time to full-time employment, OR</li> <li>• <b>Number of individuals</b> who received a raise after receiving one or more services from the grants</li> <li>• <b>Average wage increase</b></li> </ul>
Program Performance	<ul style="list-style-type: none"> <li>• <b>ROI on training investment:</b> The Partnership will develop and disseminate a measurement tool</li> </ul>
Systems Changes	<ul style="list-style-type: none"> <li>• <b>Change in perception of the retail sector</b> This grant seeks to spark both local and national shifts in the way the retail sector is perceived. One possible definition will measure the number of positive media mentions of the sector, or of careers within the sector.</li> </ul>

Each sub-awardee will also work with a program evaluator who will identify key metrics needed to assess the program. As the project progresses, the evaluator will note opportunities for continuous improvement, which will be integrated into project design and will pave the way for the creation of a scalable model that can be replicated across additional sites. Our selected partner WDBs must be willing and able to work closely with our implementation evaluator, as well as to participate in our data collection and measurement methodology.

## **SECTION II. GENERAL INFORMATION**

### **Eligible Respondents**

Federally designated local workforce development boards are the only eligible respondents.

### **Available Funding and Performance Period**

The Partnership anticipates funding between 8 and 10 sub-awards to LWDBs for two year contracts beginning in April 2016. We intend to distribute \$8 million to WDBs over two years.

### **Insurance**

Prior to a contract being executed, the following insurance requirements must be met:

The sub-grantee should be self-insured and shall maintain the following minimum insurance coverage and limits of liability at all times during the term of the contract:

- Workers' Compensation – Workers' Compensation and Employers' liability as required by law.
- Commercial General Liability - Coverage at a minimum shall be \$1,000,000 per occurrence and \$2,000,000 in the aggregate for bodily injury and property damage liability.
- Business Automotive Liability - Including coverage for all owned, hired and non-owned vehicles. Coverage shall at a minimum be \$75,000 combined single limit, bodily injury & property damage.

The sub-grantee and The Partnership may or may not choose to negotiate insurance obligations as part of their budget negotiations post-award based on the balance of other costs and deliverables. If The Partnership determines that the sub-grantee fails to comply with these insurance requirements, the sub-grantee will be placed on a “suspension” status. No payments will be processed or paid until said suspension is lifted.

### **Freedom of Information Act / Confidential Information**

Funding for this project made possible by a grant from The Walmart Foundation. The Partnership will not publically disclose proprietary information obtained as a result of this RFP. However, all responses to this RFP may be subject to the Illinois Freedom of Information Act (FOIA). To the extent that respondent submits proprietary information, The Partnership will use all reasonable efforts to claim available exemptions under state FOIA law, and will notify respondent if a FOIA request is received in connection with that proprietary information. All materials that the respondent believes are proprietary MUST be labeled “Proprietary, privileged and confidential.” The Partnership cannot guarantee that its efforts to claim available exemptions will be successful and The Partnership may be required to disclose the respondent’s information.

### **Additional Conditions**

The Partnership may request interviews/presentations from respondents as part of the evaluation process.

The Partnership shall not pay for any costs incurred by the respondents in the completion of this RFP.

The conditions of the grant specify that Walmart and affiliates (i.e. Walmart Stores, Sam’s Club) cannot benefit from this grant. Grantees may not include potential work with Walmart stores in their proposals.

### SECTION III. PROPOSAL SUBMISSION PROCESS

#### **Proposal Deadline**

***THE DUE DATE FOR SUBMISSION OF PROPOSALS, IN RESPONSE TO THIS REQUEST FOR PROPOSALS IS January 29, 2016 at 4:00PM CENTRAL TIME.*** Proposals received after the due date and time will be deemed NON-RESPONSIVE and therefore subject to rejection.

#### **Schedule of Events**

Release of RFP	December 16, 2015
Informational Webinars	January 6, 2016; 2:00 pm Central Time and January 13, 2016; 2:00 pm Central Time
Deadline for Questions	January 15, 2016; 4:00pm Central Time
Answers to Questions Posted	January 19, 2016
Proposals Due to The Partnership	January 29, 2016; 4:00pm Central Time
Announcement of Awards	March 2016
Contract Period Begins	April 2016

#### **Informational Webinars**

The Partnership will host two informational webinars on January 6, 2016 and January 13, 2016, at 2:00pm Central Time. Please visit [www.workforceboard.org](http://www.workforceboard.org) for more information on accessing the webinars.

#### **Questions**

Respondents are strongly encouraged to submit all questions and comments related to the RFP via e-mail to [mlewis@workforceboard.org](mailto:mlewis@workforceboard.org). The **deadline for questions is JANUARY 15 , 2016 at 4:00pm CST.** All questions and answers will be posted on [workforceboard.org](http://workforceboard.org) by January 19, 2016.

#### **Submittal Procedure**

All proposals must be submitted in **both electronic and paper form**, according to the following rules. Paper versions must adhere to all of the following requirements:

- One original and two copies of the full proposal
- One complete proposal containing original signatures in blue ink signed by the President, CEO or equivalent of the organization marked "Original."
- A maximum of 10 pages excluding the Appendices
- 8 1/2 x 11 letter size paper
- Double-sided printing
- Bound on the left side
- One inch margins
- Double-spaced
- 12-point font, Times New Roman

In addition, proposals must be submitted on a USB flash drive with all documents saved as adobe.pdf, Microsoft Word or Microsoft Excel files. In the electronic submittal, the Narrative should be provided separately from the Appendices. (Appendices may be combined in one electronic document.)

Both the paper files and USB flash drive must be submitted together. The outside of each envelope or package should be labeled using the following guide:

RFP for Career Opportunities in Retail: Workforce Board Collaborative

Date of Submission:

Name of Respondent:

Package \_\_\_ of \_\_\_

Delivered to:

Chicago Cook Workforce Partnership

69 W. Washington

Suite 2860

Chicago, IL 60602

ATTN: Marisa Lewis

Complete proposals will be accepted prior to the due date from 9:00 a.m. to 4:00 p.m. Monday – Friday at the same location. Late or incomplete proposals may not be reviewed. Bonded messenger delivery of proposals is encouraged.

### **Notice of Award**

All respondents will be notified as to their award status. Unsuccessful respondents who wish to obtain information on the evaluation of their proposal should submit a written request to this effect to The Partnership's Chief Administrative Officer/General Counsel (Illona Sheffey-Rawlings, [illona.sheffey-rawlings@workforceboard.org](mailto:illona.sheffey-rawlings@workforceboard.org)).

### **Disclaimers**

The issuance of this RFP does not obligate The Partnership to award a contract or to pay any costs incurred in the preparation of a proposal. The Partnership reserves the right to accept or reject any or all proposals received in response to this RFP. The Partnership can cancel or rescind this RFP, in part or in whole, if deemed necessary.

All contract awards by The Partnership, pursuant to this RFP, are contingent upon the availability of funds. Respondents are liable for any and all costs incurred prior to final authorization by and the execution of a contract with The Partnership.

The Partnership also reserves the right to:

- Rescind an award and/or reallocate the funding to another applicant should the successful respondent fail to execute its grant agreement in a timely fashion;
- Change and amend as necessary its policies or procedures governing the scope of services described herein;
- Change and amend as necessary the timeframes indicated in the Schedule of Events; and
- Perform an assessment of the risk that any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event might have on an organization's ability to provide services.



## SECTION IV. ORGANIZATION OF THE PROPOSAL

### **Submission Format**

All proposals must be organized and assembled as described in this Section.

1. Completed Checklist (Attached as Exhibit A to this RFP)
2. Proposal Narrative, including relevant resumes
3. Appendices in the order listed below

### **Proposal Narrative**

The proposal narrative must provide specific detailed responses for the items listed below in a **maximum of 10 pages (Double-spaced, double-sided, New Times Roman, 12-point size font)**. Spell out acronyms for technical terms upon first use in the narrative. Attach the resumes of the staff that will be involved in this project.

#### **A. Qualifications and Experience**

Include responses to the following questions:

1. Provide an overview of the organization's qualifications, including the number of years it has successfully provided services, types of customers and communities served under WIOA and other employment training programs.
2. Describe the geographic area served and the customer demographics.
3. Provide evidence of a critical mass and diversity of retailers, regional retail sector job openings, and a mismatch between retail labor supply and employer demand in the local area.
4. Detail the organization's experience with sector strategies within workforce development. What specific retail-related sector efforts have been undertaken in the last 3-5 years?
5. Provide a concise description of the organization's proposed program, including number of customers to be served (both jobseeker and employer).
6. Identify proposed staffing plan for the project including names, titles, and job descriptions. Provide detailed job descriptions including qualifications sought and hiring criteria for any additional positions to be created in response to this RFP.
7. What occupations comprise the local retail sector? What is the WDB's experience placing job seekers in these positions? Describe the latest retail trends both nationally and in your local area. Provide labor market information that describes both the demand and supply of potential local retail and retail-related positions.
8. Describe the WDB's experience with specific credentials in retail across the occupation groups we've identified. Are the credentials are valued by local employers? Please provide evidence or explanation of their value.
9. Describe one or more local initiatives that could be implemented in the retail sector, but is unavailable or impractical at this time due to restrictions or limitations on the use of current funding, including Workforce Investment and Opportunity Act funding.
10. Describe one or more ideas or messages you would incorporate into a local or national campaign to improve the perception of retail and related occupations, including demonstrating to jobseekers the varying career pathways and opportunities for advancement within the sector.
11. Describe past experience with, or future suggestions for, improving employers' understanding of, and infrastructure for, advancing entry level employees along retail career pathways.
12. What types of technical assistance would be most beneficial to the LWDB during the grant period.

13. The sub-awards will provide two years of funding. Describe recommendations or ideas for sustaining project work beyond the grant period.
14. We recognize the need for planning and preparation in advance of launching an initiative. Describe the anticipated length and nature of any required planning period.
15. We anticipate an average award of \$400,000 per year for two years to each selected WDB. Please provide anticipated outcomes, based on the list of metrics provided in Table 1 of this RFP.
16. Identify the three biggest challenges to this project and explain potential solutions to those challenges.
17. Provide a draft communications plan for recognizing the Walmart Foundation as the donor and The Chicago Cook Workforce Partnership as the national lead within the local community, including planned outreach to both businesses and jobseekers.

#### **B. Project Timeline & Deliverables**

18. Provide a description of project deliverables and a timeline for implementing each element of the scope and deliverables.

#### **C. Budget**

19. The average grant award is \$400,000 per year over two years. Provide a budget narrative and overall budget total that is matched to the scope detailed in this RFP. Funding is intended for programmatic costs, and is not to be used for capital expenditures.

#### **D. Financial Management Capacity**

20. The contract will be deliverables-based whereby the sub-grantee will invoice upon completion of deliverables. Describe the agency's financial capacity to manage this contract on a cost-reimbursement basis.
21. Describe any history or experience managing grant dollars (public or private) and meeting compliance requirements.
22. Has the organization ever been declared seriously deficient in the operation of a grant or contract with a government agency (federal, state or local)? If so, please describe the circumstances.

#### **Appendices**

Please provide the following documents as appendices. If a document is not applicable, please note this on the Checklist:

- A. WIOA Common Measures for last complete program year
- B. Most recent audited financial statements
- C. Unaudited financial statements for the current fiscal year
- D. A submit a copy of the most recent A133 audit report
- E. A completed IRS W-9 Request for Taxpayer Identification Number & Certification. This form can be emailed upon request or downloaded at [www.irs.gov](http://www.irs.gov)
- F. Three references, preferably from projects of similar scope and magnitude as described in this RFP. Include the organization name; contact name, address, phone number and email address; brief description of work performed; project start and end dates; initial and final (or current, if project is in process) contract amount. If your proposal includes multiple agencies or contractors, include at least one reference for each agency/contractor and note which agency/contractor worked on the referenced projects.
- G. Complete an Agency Declaration Form (attached as Exhibit B to this RFP) for each agency that is proposing to perform work under this RFP

- H. List of current Board Member names, mailing addresses, occupation/affiliation, e-mail address and phone numbers
- I. If applicable, submit a *current* letter (within last three years) from the IRS verifying the organization is exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, IRS Department of the Treasury, (877) 829-5500
- J. If applicable, submit a copy of the most recently filed IRS Form 990

## **SECTION V. PROPOSAL REVIEW PROCESS**

### **Process**

A panel which will include workforce development professionals and may include retail and related sector employers or leadership selected by The Partnership will review and evaluate all proposals based on the criteria outlined above. The Partnership will then select 8-10 respondents for recommendation to its Chief Executive Officer and potentially to select members of the Service Delivery Committee, Business Relations Committee, and Executive Committees of the Local Workforce Development Board, who will approve the final selections. The Partnership reserves the right to award contracts on the basis of proposals received without further discussions with respondents. However, The Partnership may conduct post-application investigation prior to awarding grants including the following:

- Request and review further financial information
- Interview references from respondent's current or past funders
- Assess the risk posed by any recent, current or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition or other event that might affect an organization's ability to operate the requested program

### **Criteria**

All proposals will be scored according to the criteria outlined below. The top scoring respondents may be interviewed. Because the final selection will be based on a combination of scores and interviews, The Partnership is not required to contract with the entity receiving the highest raw average score.

***Qualifications and Experience (40 points).*** The extent to which the proposal meets expectations and requirements outlined in the scope of services. An excellent proposal will include:

- A clear plan for the proposed implementation of each element of the scope
- A clear understanding of the project goals
- A reasonable staffing plan for project implementation
- Demonstrated organizational capacity for implementing sector strategies
- Evidence of a critical mass and diversity of retailers
- Evidence of a significant number of regional retail sector job openings
- Evidence of a mismatch between the supply of workers and the demands of employers
- Evidence of strong employer partnerships in the retail sector
- Unique ideas for recognizing the Walmart Foundation as the donor within their communities

***Project Timeline and Deliverables (20 points).*** The proposed timeline and deliverables achieve the necessary outcomes in the required timeframe.

***Budget (20 points).*** The extent to which the proposed budget will realistically finance the proposal's goals and scope. This includes the accuracy of the budget; its applicability to the tasks, timeline and deliverables; and the overall cost effectiveness of the proposed services.

***Financial Management Capacity (20 points).*** The extent to which the respondent has the resources and expertise to manage a contract of this size and scope, as evidenced by the Financial Management Capacity section of the proposal narrative and in the financial statements (both audited and unaudited) provided.

## **SECTION VI. PROTEST PROCEDURES TO RESOLVE PROCUREMENT DISPUTES**

All protests to resolve disputes concerning this RFP shall be submitted in writing, must specify in detail the grounds of the protest, the facts and evidence in support thereof, and the remedy sought. The written protest must be delivered to The Partnership (c/o Illona Sheffey-Rawlings, General Counsel, [illona.sheffey-rawlings@workforceboard.org](mailto:illona.sheffey-rawlings@workforceboard.org)) within the time limits provided below. In the absence of a timely and properly submitted written protest, no party responding to this RFP shall be eligible for any remedy. Any applicant desiring to protest a determination concerning this RFP must file a protest, in writing, with The Partnership no later than five (5) calendar days following release of the staff recommendation. The Partnership shall resolve any protest based upon the written protest and any oral and written response thereto provided by The Partnership staff before, or in conjunction with, The Partnership's consideration of the application and the staff recommendation. Resolution of the protest shall be deemed final.

## **SECTION VII. LIMITATIONS**

The Partnership shall not pay for any costs incurred by the applicant agencies in the completion of this RFP. Submission of an RFP does not, in any way, obligate The Partnership to award a contract. The Partnership reserves the right to accept or reject any applications, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP, if it is in the best interest of The Partnership to do so. The Partnership may require successful applicants to participate in contract negotiations prior to contract finalization. The Partnership shall reserve the right to terminate, with or without cause, any contract entered into as a result of this RFP process.

## **SECTION VII. MODIFICATION OF CONTRACTS**

Any contract awarded pursuant to this RFP may be unilaterally modified by The Partnership upon written notice to the sub-grantee under the following circumstances:

- a. Sub-grantee fails to meet performance and service expectations set forth in the contract, or
- b. The Walmart Foundation increases, reduces or withdraws funds allocated to The Partnership, which impact services solicited under this RFP

**EXHIBIT A**  
**PROPOSAL CHECKLIST**



## Career Opportunities in Retail: Workforce Board Collaborative

### PROPOSAL CHECKLIST

Name of Workforce Development Board: \_\_\_\_\_  
Geographic Jurisdiction of Workforce Development Board: \_\_\_\_\_

Proposal submissions should be compiled in the following order:

- \_\_\_\_\_ Completed Checklist
- \_\_\_\_\_ Proposal Narrative (10 pages)

### **APPENDICIES (indicate below if any documents are not applicable)**

- \_\_\_\_\_ WIOA Common Measures for last complete program year
- \_\_\_\_\_ Most recent audited financial statements
- \_\_\_\_\_ Unaudited financial statements for the current fiscal year
- \_\_\_\_\_ If your agency was subject to OMB A133 audit in the past three years, submit a copy of the most recent A133 audit report
- \_\_\_\_\_ A completed IRS W-9 Request for Taxpayer Identification Number & Certification. This form can be emailed upon request or downloaded at [www.irs.gov](http://www.irs.gov)
- \_\_\_\_\_ References
- \_\_\_\_\_ Agency declaration form
- \_\_\_\_\_ Board list
- \_\_\_\_\_ Current (within the last three years) IRS letter verifying 501(c)3 status
- \_\_\_\_\_ Copy of most recently filed IRS Form 990
- \_\_\_\_\_ **Electronic copy of proposal and all attachments on a USB Flash Drive**

**EXHIBIT B**  
**AGENCY DECLARATION FORM**



## AGENCY DECLARATION

I understand and acknowledge the requirements for funding as stated in the RFP. I further understand that this RFP does not commit the Chicago Cook Workforce Partnership (The Partnership) to award or pay any costs incurred in the preparation of a proposal.

I also understand that The Partnership is in no way bound to fund this proposal in whole or in part. I understand that The Partnership is not bound to accept the budget, timeline or deliverables proposed, and that all of these may be negotiated if appropriate. If The Partnership awards funds pursuant to this RFP, I also understand that The Partnership may unilaterally de-obligate funds due to underutilization or non-performance.

Is the undersigned agency the subject of current or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition or other event that might affect an organization's ability to operate the requested program?

\_\_\_\_\_ Yes (explain below)

\_\_\_\_\_ No

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The attached proposal and all appendices and attachments are true and accurate and are being submitted with my permission as the

Title: \_\_\_\_\_

Name of Organization: \_\_\_\_\_

Signature (use blue ink): \_\_\_\_\_

Date: \_\_\_\_\_