

Pasco Hernando Workforce Board

**Business Services
Request for Proposal
2011-2012**

The Pasco-Hernando Workforce Board is seeking an organization or organizations to provide business services as measured by Job Order Postings, Job Fair Development, Improved Outreach & Brand Recognition, Employer Business Summit, Entrepreneurial Programs, and Business-Focused Surveying.

Contractor Responsibility and Restrictions

It is anticipated that up to three (3) contracts will be awarded from this solicitation. Each proposing agency is advised that PHWB will hold the contractor totally responsible and accountable for effectively and efficiently managing and delivering the services and activities described in this RFP while achieving the contracted performance outcomes. The contractor may subcontract with other entities with prior approval of PHWB; proposing organizations are encouraged to utilize minority and women-owned and operated businesses as subcontractors. *A proposal that includes subcontracting all activities and services in this RFP to other agencies will not be considered responsive.*

Funding Period/Period of Performance

The funding period for the contract awarded under this solicitation will be from October 1, 2011 through June 30, 2012 provided performance remains acceptable during that period. Any contract awarded from this RFP will include an option to renew for up to two additional one-year periods, contingent upon successful performance and funding availability. *If the successful bidder sits upon the PHWB or has employees that are members of the Board, execution will be delayed until approval by the Board, AWI & Workforce Florida.*

Funding Available

These services will be funded from the Wagner Peyser funds received by the PHWB. The Board has identified \$400,000 for the funding of these activities and looks to ensure services are provided for both counties in its service region. This amount is provided as a planning figure only and does not commit PHWB to award a contract or contracts for this amount. **The \$400,000 amount is inclusive of costs to perform these services by contractor and the PHWB expenditures for services needing to be procured to perform these services such as media purchases, printing, speaker's fee, facility rental, etc.** The Board looks to award up to three contracts to cover as much of the two county area as possible. Funding during the contract period may be adjusted due to changes in funding received.

Type of Contract

Proposed costs will be analyzed and a contract will be negotiated on a fixed unit price basis on benchmark attainment and the prices for the negotiated benchmarks. **There will be no contract negotiated with a cost reimbursement payment structure.**

Due to the nature of the funding source, potential changes in legislation and policies, and performance achieved, proposing organizations are advised that

any contract awarded under this RFP may be modified to incorporate such changes, system-wide adjustments in the delivery system, or any activities provided.

Scope of Work

Job Orders – Approximately 50%

The Quarterly Survey of Employment and Wages for 2010 indicates there are more than 13,000 employers paying unemployment compensation in the Pasco-Hernando Workforce Region, and the ratio between the counties is 2.85 to 1 (Pasco to Hernando). In program year 2010-2011- 775 unique employers in Pasco and Hernando Counties used Employ Florida Marketplace (EFM) to list 1,693 distinct job orders. The ratio of job orders between the counties was 1.165 to 1 (Pasco to Hernando). The Board seeks to improve this performance by more than 10% for the upcoming program year. It is seeking 855 or more unique employers to list more than 1,865 job orders during 2011-2012. For the 9-month period of the proposed contract, the Board asks for 640 employers listing 1,399 job orders on EFM.

- Specifically, each unique employer would be worth a negotiated benchmark and each job order worth another negotiated benchmark. Eighty-five percent (85%) of the funds for this activity will be earned through employer and job order recruitment.
- In addition, for each additional 7 unique employers the contract would be worth a lump sum negotiated payment (maximum of 112 additional employers – total possible earnings 10% of the activities' funding).
- Also, a lump sum benchmark of 2.5% of the activities' funding would be payable at the end of the contract if the ratio of employers improved to 1.5 to 1 (Pasco to Hernando) by June 30, 2012.

Additionally for 2010-2011 – the average wage for positions listing wages was \$10.86/hr or \$22,526.40/yr. The Board is seeking to raise this average wage to \$11.36/hr or \$23,628.80/yr.

- A lump sum payment of 2.5% of the activities' funding would be payable at the end of the contract if the average wage of job orders is \$11.36/hr or higher.

Board Role: The Board will provide successful bidders with names of businesses that used Career Central to advertise for employees during 2010-2011. Additionally, all job orders will be entered into EFM one of two ways: 1. By direct input of the employer (then reviewed by Board staff) or 2. By Board staff. The four options for an employer to list a position in EFM will be: 1. Direct input into EFM; 2. Fax a job order form to Board Staff; 3. Submit an online job order at careercentral.jobs; or 4. Directly contact Board Staff by telephone. The Contractor will receive credit for any of these job orders regardless of entry point. Board staff will provide the contractor(s) monthly updates on their progress to include: number of unique employers, number of job orders, geographic location of the employers, and average wage.

Job Fairs - Approximately 5%

The PHWB desires to hold three large job fairs within its region at a fixed negotiated cost per job fair.

A quality job fair will include the following:

- Not less than 21 employers with current open job orders in EFM or a mixture of fewer employers with 37 or more documentable job openings in EFM.
- Publicity for 6 weeks prior in newspapers, on-line, radio, and television/cable advertising
- Registration of job seekers prior to entry to capture placements and referrals
- Follow-up with employer to record hires obtained through the job fair
- No multi-level marketing, commission only or training providers allowed to participate

The intent is to have 2 fairs in Pasco County and 1 event in Hernando County. PHWB will reimburse itemized expenses for putting on these jobs fairs up to \$1500 each. No reimbursement may be made for food or beverage (including water) expenses.

Board Role: The Board will provide Career Central resource room staff (and others) as the need is determined by the Contractor(s) for the conduct of the job fairs. Also, the Board will advertise on its website and coordinate advertisement with its other advertising vendors such as the St. Petersburg Times and WWJB/WXJB.

Improved Outreach & Brand Recognition – Approximately 21%

In an effort to further expand the reach of and familiarity with Career Central and its services within the employer community, PHWB requests a contractor to conduct outreach efforts that place Career Central logo and information where it will be accessed and seen by employers. This effort would include placement of Career Central links on web page directed at Pasco and Hernando County employers, newspaper ads, television commercials, and other promotional activities.

The successful proposer will outline its campaign in its proposal and have the first quarter of the contract period to solidify the plan and submit it to the Business Competiveness Committee of the PHWB. Upon acceptance by the Committee, the contractor will implement the campaign during the last two quarters.

The PHWB will pay the contractor a fixed negotiated amount for an approved plan. Then the contractor may earn a negotiated benchmark per quarter for successful progress on implementing the plan.

Board Role: Board representatives will meet with the successful bidder to assist in the development of the plan by clearly defining the vision and target audience for such a brand recognition program. The Board will fund (to the extent it is able) the execution of

the plan for costs beyond those incurred by the contractor for personnel, rent, utilities, and indirect/overhead.

Entrepreneurial Programs – Approximately 10%

The PHWB seeks the provision of entrepreneurial programs in both Hernando and Pasco Counties. This program(s) would include a variety of topics. The following are some suggested topics:

- Getting Started – The Business Plan
- Licensing and Permitting – Pasco, Hernando, and Florida
- E-Commerce – Making it Work for You
- Technology for Entrepreneurs
- Negotiations and Sales
- Hiring – Avoiding the Pitfalls
- Law for Entrepreneurs

The proposer will develop a curriculum and submit for approval to the Business Competiveness Committee of the PHWB. Upon acceptance by the Committee, the contractor may invoice for an amount negotiated with PHWB.

The contractor will conduct 9 session of coursework in each county and will be reimbursed a fixed negotiated benchmark amount for each session held. At least two weeks (minimum 10 business days) prior to each course, the successful proposer will deliver an e-mail announcement with an announcement flyer attached (in pdf format) to a designated Career Central contact. The classes will be offered at no charge to WIA Career Central customers, and the PHWB encourages the contractor to provide the instruction at no charge to the general public.

Board Role: The Board will make classroom space available in its Career Central centers for these classes and/or assist the successful bidder(s) in obtaining space with partner organizations.

Employer Business Summit – Approximately 3%

The successful proposer will develop an economic summit directed at local employers. The summit will encompass both counties and focus on issues related to employment, expansion, training, e-commerce, export expansion and the economic outlook for and within the Region and the Tampa, Clearwater, St. Petersburg Metropolitan Statistical Area. Summit may be one day or multiple days and held in either April or May 2012.

The contractor will receive fixed negotiated benchmark on submission to and approval of the Business Competiveness Committee for a detailed plan outlining agenda, programs, speakers, location, date(s) and budget for the event by December 31, 2011. Upon holding the event the contractor may invoice for the additional negotiated benchmark of the same amount.

Board Roll: The Board will fund (to the extent it is able) the execution of the plan for costs beyond those incurred by the contractor for personnel, rent, utilities, and indirect/overhead. These can include speaker fees and expenses, venue costs,

advertising, printing, program materials, and other costs. These expenses may not include food or beverage costs.

Business Focused Surveying - 3%

The PHWB looks for a successful proposer to conduct 9 surveys during the contract period. One survey is sought per quarter in each county. The contractor will strive to reach a "decision maker" at each company to answer the survey, and the surveys will not be industry or sector specific unless negotiated in the contract.

The surveys for a particular quarter will be the same for both counties, but the general theme of surveys may change from quarter to quarter. However, every survey will begin with the following two questions:

1. Do you anticipate total employment at your location to increase, decrease, or remain the same in the quarter ending _____ as compared to the current quarter?
2. Do you anticipate make any capital equipment purchases (items over \$5,000) in the quarter ending _____?

The contractor will be paid a fixed negotiated benchmark for each survey (minimum – 75 responses per survey) submitted to the PHWB. Surveys must be completed and submitted prior to the last day of the quarter (12/31/2011, 3/31/2012, and 6/30/2012). Survey Monkey is an acceptable vehicle for conducting the surveys, but the contractor will not be restricted to its use.

Board Role: The Board staff will advise the contractor on employer penetration and industry mix in order to increase validity of the surveys.

Questions

Any question(s) must be submitted in writing, by mail, email or fax to:

Jerome Salatino
CEO
3185 Premier Drive
Brooksville, Florida 34604
jsalatino@careercentral.jobs
Fax 352-593-2202

PART II: PROCUREMENT TIMETABLE

<u>Procurement Action</u>	<u>Date</u>
RFP Packets Available/Issue RFP	Friday, August 26, 2011
Bidders' Conference	Tuesday, August 30, 2011 –10:00 a.m.
Letter of Intent to Bid Due	Wednesday, August 31, 2011
Proposals Due (Extended)	Wednesday, September 28, 2011, 3:30 p.m.
Contract Execution	Saturday, October 1, 2011
Provision of Services	Saturday, October 1, 2011

All times shown are Eastern Daylight Time (EDT). The PHWB reserves the right to adjust the schedule when it is in the best interest of the PHWB or to extend any published deadline in this RFP upon notification to those who have submitted a Letter of Intent to Bid by the date specified.

All potential respondents are strongly encouraged to attend the bidders' conference since this will be the best opportunity for having technical and other concerns addressed. A copy of the contract boilerplate and proposal review/rating sheet will be distributed at the bidders' conference. The bidders' conference will be held at the Pasco Hernando Workforce Board's administrative offices (see address below).

The Letter of Intent to Bid is mandatory and must clearly identify the proposing agency, any subcontractor(s), and the activities or services that each subcontractor will deliver. This letter of intent does not commit a proposing agency to submitting a proposal. The Letter of Intent to Bid and the proposal must be received at the PHWB's offices by the dates and times shown above. The prospective proposing agency is solely responsible for assuring that anything sent to the PHWB arrives safely and on time. The PHWB offices are located at:

3185 Premier Drive
Brooksville, Florida 34604
Telephone Number: 352-593-2231
Fax Number: 352-593-2202

PROPOSAL OUTLINE

Each proposer should submit a single proposal (1 original, 5 copies, and 1-electronic copy on CD), no longer than 14 pages in length (single-spaced, 12-point type, 1 inch overall margins). Attachments, cover page, and required forms are not included in this page count.

Proposal Format

Cover Page

Organization Introduction – 1 page

What are the proposing organization's structure and its past experience in recruitment, outreach, and relationship building with business in Pasco and/or Hernando Counties?

Proposed Activities – 4 pages

How does the organization propose to accomplish each portion of the Scope of Work: Job Orders, Job Fairs, Improved Outreach and Brand Effectiveness, Entrepreneurial Programs, and Business Focused Surveying?

Fractional Service – 2 pages

If the proposing organization is not looking to provide all of these services region-wide, what portion of the required performance does the proposer offer to perform?

Budget – up to 6 pages

Completed budget sheets, one for each activity proposed, and estimated costs requested of the PHWB for the conduct of these activities beyond *personnel, rent, utilities, and indirect/overhead*.

Coordination – 1 page

What other organizations will the proposing agency coordinate with, and what other funds will be leveraged to accomplish the program's activities

All proposals will be evaluated on the basis of cost-effectiveness in relation to high quality service delivery. To accomplish this, the PHWB's staff shall conduct an analysis of proposed strategies and plans offered for service provision during the proposal review process. Agencies are therefore

encouraged to submit their best offer for providing the program solicited in this RFP and to thoroughly describe and justify each of its activities. This analysis shall be conducted to ensure that the proposed costs are necessary, fair and reasonable; to determine if the proposed costs are allowable and allocable; to determine if there is no duplication of costs with other programs; and to ensure that the costs are directly associated with carrying out only the proposed services.

Required Attachments

ORGANIZATIONAL BACKGROUND

ADMINISTRATIVE AND FINANCIAL CAPABILITIES CHECKLIST

CONFLICT OF INTEREST STATEMENT/CERTIFICATION

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER MATTERS

CERTIFICATION REGARDING LOBBYING

SWORN STATEMENT UNDER SECTION 287/133(3)(A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

SELECTION

The PHWB maintains a policy that an organization must possess the demonstrated ability to perform successfully under the terms and conditions of a proposed contract prior to the contract being executed. Determinations of demonstrated performance shall take into consideration such matters as to whether the organization has:

- ◆ Adequate financial resources or the ability to obtain them;
- ◆ The ability to meet the RFP design specifications at a reasonable cost, as well as the ability to meet performance goals;
- ◆ A satisfactory record of past performance in delivering the proposed services, including demonstrated quality of services and successful outcome rates from past programs;
- ◆ The ability to provide services and/or a program that can meet the need identified;
- ◆ A satisfactory record of integrity, business ethics and fiscal accountability;
- ◆ The necessary organization, accounting and operational controls; and
- ◆ The technical skills to perform the work.

All prospective proposing organizations are prohibited from contacting any PHWB board member, PHWB committee member or PHWB staff (other than contact person identified in Part I of this RFP) regarding this solicitation to avoid actual conflicts, the appearance of conflicts, or undue influence over the process. Contact during any part of this solicitation period with anyone for purposes of influencing the outcome of the procurement process will result in the disqualification of the prospective proposer.

A. Proposal Review and Contract Award

Proposals will be initially reviewed and rated by the PHWB staff members using a point system based on a Proposal Evaluation/Rating Form. The review team will prepare a proposal-rating summary for review by the Board and/or its Executive Committee. Prospective providers may be

invited to make oral presentations and/or explain their proposals. A proposal will be selected for award contingent upon successful contract negotiation.

A contract may be awarded based on offers received without discussion of such offers with the proposers. Each offer should, therefore, be submitted in the most favorable terms, from a price and technical standpoint that the offeror can make. However, the review team reserves the right to request additional data, oral discussion or presentation in support of written proposals.

Final award of a contract will be contingent upon:

- ◆ Successful negotiation of a contract;
- ◆ Acceptance by the proposer of the contract terms and conditions;
- ◆ Satisfactory verification of past performance and systems (e.g., financial), where applicable; and
- ◆ Availability of funding.

B. Conditions of This RFP

This Request for Proposal does not commit or obligate PHWB to award a contract, to commit any funds identified in this RFP document, to pay any costs incurred in the preparation or presentation of a proposal to this RFP, to pay for any costs incurred in advance of the execution of a contract, or to procure or contract for services or supplies.

The following conditions are applicable to all proposals. The PHWB reserves the right to:

1. Accept or reject any or all proposals in whole or in part, which it considers not to be in its best interest.
2. Change or waive any provisions set forth in this RFP.
3. Return non-conforming proposals without review.
4. Waive informalities and minor irregularities in proposals received.
5. Negotiate any and all proposed terms, conditions, costs, staffing level, services / activities mix, and all other specifics.

6. Request a) additional data, b) technical or price revisions, or c) oral presentations in support of the written proposal.
7. Determine that an arms-length agreement exists between the proposer and any subcontractors or vendors they might choose to use.
8. Require the establishment of escrow accounts for a Contractor that currently has outstanding debts to the PHWB as a result of audits or monitoring reviews.
9. Conduct a pre-award review that may include, but is not limited to, a review of the proposer's record keeping procedures, management systems, accounting and administrative systems, and program materials.
10. Use additional or deobligated grant funds to increase the slot level of successful programs.
11. Change specifications and modify contracts as necessary to (a) facilitate compliance with the legislation, regulations and policy directives, (b) to manage funding and (c) to meet the needs of the customers.
12. End contract negotiations if acceptable progress, as determined by the PHWB, is not being made within a reasonable time frame.

PHWB
Business Services RFP
Proposal Cover sheet

Submitted in response to 2011-2012 Business Services RFP

NAME OF PROPOSING AGENCY: _____

ADDRESS: _____

TELEPHONE NUMBER: _____

FAX NUMBER: _____

EMAIL ADDRESS: _____

Name and title of person authorized to answer any questions about the proposal, negotiate the contract terms and contractually bind the proposer:

I do hereby certify that this proposal is submitted in accordance with the provisions and conditions outlined in the PHWB Business Services RFP, that all the information is complete and accurate, and that this proposal represents a firm and fixed offer to provide the requested services. This offer shall remain valid for a minimum of 90 days. I also certify that the fees in the proposal have been arrived at independently, without consultation, communication, or agreement with any other proposer or with any other competitor for the purpose of restricting competition, as to any matter relating to such fees; and no attempt has been made or will be made by the proposer to induce any other person or agency to submit or not submit a proposal for the purpose of limiting or restricting competition. I further certify that this agency can and will provide and make available, at a minimum, all services described in this proposal.

Signature of Individual with Signatory Authority

Date

Typed name and Title

PROPOSED BUDGET SUMMARY ORGANIZATIONAL BACKGROUND

1. Name of Organization:

2. Contact Person:

3. Address:

4. Telephone Number: () 5. FEID Number:

6. The Proposer's organization operates as: an individual, a partnership, a public agency (specify): a corporation incorporated under the laws of the State of _____, other (specify):

7. Check to indicate if your organization is: community-based organization (CBO), minority-owned enterprise, female-owned enterprise

8. The proposer's organization operates on: not-for-profit, for-profit basis

9. The proposer certifies without exception, with exception, as explained on the attached, that:

- a. it has no outstanding liens, claims, debts, judgments, or litigation pending against it which would materially affect its programmatic or financial abilities to implement and carry out its proposed program;
- b. it has not complied with an official order of any agency of the State of Florida, or the United States Department of Labor to repay disallowed costs incurred during its conduct of projects or services;
- c. it is current in its payment of applicable federal, state, and local taxes;
- d. it is free and clear of any disallowed audited costs;
- e. its costs and pricing data submitted with this proposal are representative of only those reasonable, allowable, and allocable costs necessary for carrying out it proposed program;
- f. it will comply with the assurances attached to this RFP, and the WIA and its promulgated rules and regulations;
- g. it is authorized to submit this proposal in accordance with the policies of its governing body; and
- h. the attached certifications for suspended or debarred, lobbying, and assurances have been signed by the organization's authorized person.

By my signature, I am empowered to and can act on behalf of the proposing organization in submitting this proposal. I certify that the information contained herein is true and correct to the best of my knowledge, and that the offer contained herein is true and correct to the best of my knowledge, and that the offer contained herein is firm and valid for a period not to exceed 60 days from this proposal's date.

Signature

Date

Typed Name and Title

ADMINISTRATIVE AND FINANCIAL CAPABILITIES CHECKLIST

Please respond to each statement or question with a "yes" or "no" answer. Briefly explain any "no" answer on another page or in the limited space provided.

- Yes No 1. All positions with the proposing agency have up-to-date job descriptions.
- Yes No 2. All employees meet the minimum qualifications specified in their job descriptions.
- Yes No 3. All W-2's and I-9's with appropriate documentation are on file.
- Yes No 4. Withholding and FICA deposits have been made in full on a timely basis.
- Yes No 5. Insurance and bonding policies are current and all appropriate staff are covered.
- Yes No 6. The facilities of this agency and any training location are accessible to the disabled. Attach a completed ADA facility checklist.
- Yes No 7. The books of account are auditable.
- Yes No 8. Administrative and internal accounting controls are adequate to safeguard program assets.
- Yes No 9. The accounting system adequately accounts for program funds.
- Yes No 10. Financial reports fairly present accrued program expenditures by established cost categories.
- Yes No 11. Budgetary procedures are adequate to control expenditures.
- Yes No 12. The agency has a written accounting procedures manual that includes procedures for:
- a) coding of expenditures by:
- Yes No (1) contract year or program year
- Yes No (2) funding source
- Yes No (3) cost category;
- Yes No b) bank reconciliations
- Yes No c) posting to books
- Yes No d) monthly close-out
- Yes No e) trial balancing
- Yes No f) development of accruals
- Yes No g) segregation of duties
- Yes No h) cost allocation
- Yes No i) budgetary control
- Yes No j) cash management
- Yes No k) cash receipt and disbursement
- Yes No l) payroll
- Yes No m) reconciliation of any petty cash fund
- Yes No 13. The procedures in the accounting manual are being followed.
- Yes No 14. Internal controls
- a) for cash receipts:
- Yes No (1) cash is properly controlled and promptly deposited when received
- Yes No (2) funds are deposited in a bank in interest bearing checking accounts and secured by FDIC or other security

- b) checks are:
- Yes No (1) pre-numbered
 - Yes No (2) adequately safeguarded
 - Yes No (3) properly mutilated when voided
 - Yes No (4) not allowed to be written for cash
 - Yes No (5) not allowed to be signed in advance;
- c) for cash disbursements:
- Yes No (1) invoices are approved prior to payment
 - Yes No (2) documentation accompanies checks to be signed
 - Yes No (3) documentation is stamped to prevent reuse
 - Yes No (4) control over signature machine is adequate
 - Yes No (5) disbursements are made only by check
 - Yes No (6) checks are not returned to preparer after signing
- d) for bank reconciliations:
- Yes No (1) they are performed on time
 - Yes No (2) they are performed by someone who does not perform cash functions
 - Yes No (3) unusual items are investigated promptly
- e) for payroll:
- Yes No (1) time sheets are used and signed by both the employee and supervisor
 - Yes No (2) payrolls are approved by management for accuracy and existence of bona fide employees
 - Yes No (3) preparation and check distribution functions are segregated
 - Yes No (4) leave time is properly controlled
- f) for purchases:
- Yes No (1) purchase orders are pre-numbered and controlled
 - Yes No (2) receiving reports are prepared and compared to P.O. and invoice
 - Yes No (3) returned purchases are controlled
 - Yes No (4) payments are made within discount periods
- Yes No 15. The agency's budget has no areas for potential cost overruns.
- Yes No 16. The agency is not trying to make up for a shortfall in another program by using the funds from this program.

I hereby certify that I have completed this Administrative and Financial Capabilities Checklist accurately and to the best of my knowledge. I, the financial officer or C.E.O. of the proposing agency, accept responsibility for providing financial services adequate to insure the establishment and maintenance of an accounting system with internal controls adequate to safeguard program funds.

Organization: _____

Name of Certifying Official: _____

Signature

Date

Budget Proposal Template – Job Orders			
Nature of expenditure/ Item	Quantity	% of time	Amount
DIRECT COSTS			
Personnel			
<i>List Personnel Costs</i>			
<i>Personnel Costs Subtotal</i>			
Fringe Benefits			
<i>List Fringe Benefits</i>			
<i>Fringe benefits Subtotal</i>			
Material and Supplies			
<i>List Materials and supplies</i>			
<i>Subtotal Material and Supplies</i>			
Travel - Local Transportation Only			
<i>List Travel costs - mileage and reimbursement rate</i>			
<i>Subtotal Travel</i>			
OTHER Direct Costs			
Rent			
Mail			
Communication / Internet/ Photocopying			
<i>Subtotal Other Direct Costs</i>			
INDIRECT COSTS			
<i>List indirect Costs or approved indirect cost rate (attach necessary documentation is using an IRS approved rate (Accounting Services, Auditor & Lawyers fees, Electricity, Maintenance, Depreciation of Equipment, and general project administration)</i>			
<i>Subtotal Indirect Costs</i>			
Items and products to be funded by the PHWB			
<i>Subtotal for other Items</i>			
			TOTAL for Activity

Budget Proposal Template – Job Fairs			
Nature of expenditure/ Item	Quantity	% of time	Amount
DIRECT COSTS			
Personnel			
<i>List Personnel Costs</i>			
<i>Personnel Costs Subtotal</i>			
Fringe Benefits			
<i>List Fringe Benefits</i>			
<i>Fringe benefits Subtotal</i>			
Material and Supplies			
<i>List Materials and supplies</i>			
<i>Subtotal Material and Supplies</i>			
Travel - Local Transportation Only			
<i>List Travel costs - mileage and reimbursement rate</i>			
<i>Subtotal Travel</i>			
OTHER Direct Costs			
Rent			
Mail			
Communication / Internet/ Photocopying			
<i>Subtotal Other Direct Costs</i>			
INDIRECT COSTS			
<i>List indirect Costs or approved indirect cost rate (attach necessary documentation is using an IRS approved rate (Accounting Services, Auditor & Lawyers fees, Electricity, Maintenance, Depreciation of Equipment, and general project administration)</i>			
<i>Subtotal Indirect Costs</i>			
Items and products to be funded by the PHWB			
<i>Subtotal for other Items</i>			
			TOTAL for Activity

Budget Proposal Template – Improve Outreach/Brand Recognition			
Nature of expenditure/ Item	Quantity	% of time	Amount
DIRECT COSTS			
Personnel			
<i>List Personnel Costs</i>			
Personnel Costs Subtotal			
Fringe Benefits			
<i>List Fringe Benefits</i>			
Fringe benefits Subtotal			
Material and Supplies			
<i>List Materials and supplies</i>			
Subtotal Material and Supplies			
Travel - Local Transportation Only			
<i>List Travel costs - mileage and reimbursement rate</i>			
Subtotal Travel			
OTHER Direct Costs			
Rent			
Mail			
Communication / Internet/ Photocopying			
Subtotal Other Direct Costs			
INDIRECT COSTS			
<i>List indirect Costs or approved indirect cost rate (attach necessary documentation is using an IRS approved rate</i>			
<i>(Accounting Services, Auditor & Lawyers fees, Electricity, Maintenance, Depreciation of Equipment, and general project administration)</i>			
Subtotal Indirect Costs			
Items and products to be funded by the PHWB			
Subtotal for other Items			
TOTAL for Activity			

Budget Proposal Template – Entrepreneurial Programs			
Nature of expenditure/ Item	Quantity	% of time	Amount
DIRECT COSTS			
Personnel			
<i>List Personnel Costs</i>			
<i>Personnel Costs Subtotal</i>			
Fringe Benefits			
<i>List Fringe Benefits</i>			
<i>Fringe benefits Subtotal</i>			
Material and Supplies			
<i>List Materials and supplies</i>			
<i>Subtotal Material and Supplies</i>			
Travel - Local Transportation Only			
<i>List Travel costs - mileage and reimbursement rate</i>			
<i>Subtotal Travel</i>			
OTHER Direct Costs			
Rent			
Mail			
Communication / Internet/ Photocopying			
<i>Subtotal Other Direct Costs</i>			
INDIRECT COSTS			
<i>List indirect Costs or approved indirect cost rate (attach necessary documentation is using an IRS approved rate (Accounting Services, Auditor & Lawyers fees, Electricity, Maintenance, Depreciation of Equipment, and general project administration)</i>			
<i>Subtotal Indirect Costs</i>			
Items and products to be funded by the PHWB			
<i>Subtotal for other Items</i>			
	TOTAL for Activity		

Budget Proposal Template – Employer Business Summit			
Nature of expenditure/ Item	Quantity	% of time	Amount
DIRECT COSTS			
Personnel			
<i>List Personnel Costs</i>			
Personnel Costs Subtotal			
Fringe Benefits			
<i>List Fringe Benefits</i>			
Fringe benefits Subtotal			
Material and Supplies			
<i>List Materials and supplies</i>			
Subtotal Material and Supplies			
Travel - Local Transportation Only			
<i>List Travel costs - mileage and reimbursement rate</i>			
Subtotal Travel			
OTHER Direct Costs			
Rent			
Mail			
Communication / Internet/ Photocopying			
Subtotal Other Direct Costs			
INDIRECT COSTS			
<i>List indirect Costs or approved indirect cost rate (attach necessary documentation is using an IRS approved rate (Accounting Services, Auditor & Lawyers fees, Electricity, Maintenance, Depreciation of Equipment, and general project administration)</i>			
Subtotal Indirect Costs			
Items and products to be funded by the PHWB			
Subtotal for other Items			
TOTAL for Activity			

Budget Proposal Template – Business Focused Surveying			
Nature of expenditure/ Item	Quantity	% of time	Amount
DIRECT COSTS			
Personnel			
<i>List Personnel Costs</i>			
Personnel Costs Subtotal			
Fringe Benefits			
<i>List Fringe Benefits</i>			
Fringe benefits Subtotal			
Material and Supplies			
<i>List Materials and supplies</i>			
Subtotal Material and Supplies			
Travel - Local Transportation Only			
<i>List Travel costs - mileage and reimbursement rate</i>			
Subtotal Travel			
OTHER Direct Costs			
Rent			
Mail			
Communication / Internet/ Photocopying			
Subtotal Other Direct Costs			
INDIRECT COSTS			
<i>List indirect Costs or approved indirect cost rate (attach necessary documentation is using an IRS approved rate (Accounting Services, Auditor & Lawyers fees, Electricity, Maintenance, Depreciation of Equipment, and general project administration)</i>			
Subtotal Indirect Costs			
Items and products to be funded by the PHWB			
Subtotal for other Items			
TOTAL for Activity			

CONFLICT OF INTEREST STATEMENT/CERTIFICATION

PHWB 2011/2012 Business Services RFP

The Proposer must execute either Section I or Section II hereunder relative to Florida Statute 112.313(12). Failure to execute either Section may result in rejection of this Contract.

SECTION I

I hereby certify that no official or employee of the Board, or any Board member, or any immediate family member of a Board employee or Board member has a material financial interest in this firm.

Signature

Company Name

Name of Official (Type or Print)

Business Address

City, State, Zip Code

SECTION II

I hereby certify that the following named Board official(s), employee(s), Board member(s), or immediate family member of a Board employee or board member has a material financial interest(s) [in excess of 5%] in this firm and has filed the appropriate Conflict of Interest statements with the Board prior to the review and discussion of this proposal.

Name

Title or Position

Date of Filing

Signature

Company Name

Name of Certifying Official

Business Address

City, State, Zip Code

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER MATTERS

1. The prospective primary participant certifies to the best of its knowledge and belief, that it, and its principals:
 - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transaction by any federal department or agency;
 - b. Have not within a three (3) year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - c. Are not presently indicated for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in 1b above, of this certification; and
 - d. Have not, with a three (3) year period preceding this application/proposal had one or more public transactions (federal, state, or local) terminated for cause or default.

2. That if the prospective primary participant is unable to certify to any statements in this certification, such prospective primary participant shall attach an explanation to the proposal.

Name & Title of Authorized Representative

Signature

Date

CERTIFICATION REGARDING LOBBYING

Certification For Contracts, Grants, Loans and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal Grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Proposer Organization

Program Title

Name of Certifying Official

Signature Date

**SWORN STATEMENT UNDER SECTION 287/133(3)(A),
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

**THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC
OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted to: Pasco-Hernando Workforce Board, Inc.

by _____
(print individual's name and title)

for _____
(print name of entity submitting sworn statement)

whose business address is _____

and (if applicable) its Federal Employer Identification Number (FEIN) is _____
(if the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement).

2. I understand that a "public entity crime" as defined in Paragraph 287.133 (1) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133 (1) (a), Florida Statutes, means:

- a. A predecessor or successor of a person convicted of a public entity crime; or
- b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income

among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133 (1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the applicable statement which I have marked below is true in relation to the entity submitting this sworn statement.

_____ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989; however, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. Attached is a copy of the final order.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED, OR THROUGH THE END OF THE CONTRACT FOR WHICH IT IS BEING SIGNED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Signature

Signature Date _____

STATE OF _____ COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority,

(name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above

on this ____ day of _____, 20__.

NOTARY PUBLIC

My commission expires: _____

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

The regulations regarding a drug-free workplace were published in Part II of the April 25, 1989, Federal Register (pages 17861-17862).

A. Definitions. As used in this provision,

"Controlled substance" means a controlled substance in schedules I through V of section 202 of the Controlled Substances Act (21 U.S.C. 812) and as further defined in regulation at 21 CFR 1308.11 - 1308.15.

"Conviction" means a finding of guilt (including a plea of nolo contendere) or imposition of sentence, or both, by any judicial body charged with the responsibility to determine violations of the Federal or State criminal drug statutes.

"Criminal drug statute" means a Federal or non-Federal criminal statute involving the manufacture, distribution, dispensing, possession or use of any controlled substance.

"Drug-free workplace" means a site for the performance of work done in connection with a specific contract at which employees of the Contractor are prohibited from engaging in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance.

"Employee" means an employee of a Contractor directly engaged in the performance of work under a government contract.

"Individual" means a proposer/contractor that has more than one employee, including the proposer/contractor.

B. By submission of its offer, the proposer, if other than an individual, who is making an offer that equals or exceeds \$25,000, certifies and agrees, that with respect to all employees of the proposer to be employed under a contract resulting from this solicitation, it will:

1. Publish a statement notifying such employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition;
2. Establish a drug-free awareness program to inform such employees about--
 - i. The dangers of drug abuse in the workplace;
 - ii. The Contractor's policy of maintaining a drug-free workplace;
 - iii. Any available drug counseling, rehabilitation, and employee assistance programs; and
 - iv. The penalties that may be imposed upon employees for drug violations occurring in the workplace;
3. Provide all employees engaged in the performance of the contract with a copy of the statement (b)(1) of this provision;

4. Notify such employees in the statement required by subparagraph (b) (1) of this provision that as a condition of continued employment on the contract resulting from this solicitation, the employee will:

- i. Abide by the terms of the statement; and
- ii. Notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such conviction;

5. Notify the contracting officer within ten (10) days after receiving notice under subdivision (b) (4) (ii) of this provision, from an employee or otherwise receiving notice of such conviction; and

6. Within 30 days after receiving notice under subparagraph (a) (4) of this provision of a conviction, impose the following sanctions or remedial measure on any employee who is convicted of drug abuse violations occurring in the workplace;

- i. Take appropriate personnel action against such employee, up to and including termination or;
- ii. Require such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency.

7. Make a good faith effort to maintain a drug-free workplace through implementation of subparagraphs (b) (1) through (b) (6) of this provision.

C. By submission of its offer, the proposer, if an individual who is making an offer of any dollar value, certifies and agrees that the proposer will not engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in the performance of the contract resulting from this solicitation.

D. Failure of the proposer to provide the certification required by paragraph (b) or (c) of this provision, renders the proposer unqualified and ineligible for award.

E. In addition to other remedies available to the Government, the certification in paragraphs (b) or (c) of this provision concerns a matter within the jurisdiction of any agency of the United States and the making of false, fictitious, or fraudulent certification may render the maker subject to prosecution under Title 18, United States Code, Section 1001.

Where the proposer is unable to certify to any of the statements in these provisions, the proposer shall attach an explanation to this proposal. Proposer shall also submit a copy of its policy regarding a drug-free workplace to the Board.

Proposer: _____

Certifying Official: _____

Title: _____

Date: _____

Proposal Rating Form

Has the proposal been submitted in accordance with the Proposal Outline – pages 5 and 6 of the RFP

Organization: Rate the organization’s experience with the business and services targeted by the RFP within the Pasco Hernando Workforce Region

No Prior Experience	1-2 Years	3-4 Years	5-6 Years	7-9 Years	10 or more years
0	2	4	6	8	10

Proposed Activities: Are the proposed recruitment, outreach, education and surveying activities comprehensive, continuous, and do they make sense

Activities are comprehensive, continuous and make sense										
Missing all the elements		Missing two of the elements		Missing one of the elements..		Has all the elements				
0	2	4	6	8	10	12	14	16	18	20

List missing elements: _____

Fractional Service 1: What percentage of the Workforce Region does the proposer intend to serve?

Consider population and businesses covered, not geography										
0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
0	2	4	6	8	10	12	14	16	18	20

Fractional Service 2: What percentage of the services request does the proposal address and offer to provide

Consider percentage of activities proposed out of 6 total sought services					
16.7%	33.3%	50%	66.7%	83.3%	100%
0	2	4	6	8	10

Proposed Budget: Do the proposed budgets appear reasonable and necessary to accomplish the outlined activities.

Budget is Reasonable and Necessary										
No basis in reality		Most cost unreasonable		50% of Costs Reasonable		75% of Costs Reasonable		More than 75% of costs reasonable		
0	2	4	6	8	10	12	14	16	18	20

Coordination: Does the proposal outline working with other organization(s) and leveraging its own and other funding to ensure success?

No Coordination or Leveraging	Coordination or leveraging funds only		Coordinating with only 1 or 2 organizations & leveraging funds		Coordinating with 3 or more organizations & leveraging funds	
0	2	4	6	8	10	

Directions: Reviewers are reminded to rank proposals in a consistent manner to ensure an objective result. Splitting category cells and awarding odd number or ½ point rankings is encouraged if the reviewer feels it is appropriate for an accurate proposal rating.

PROTEST PROCEDURES

Pasco Hernando Workforce Board, Inc. Regional Board, Inc.

Protest Procedures:

In the event that a dispute arises as a result of Pasco Hernando Workforce Board, Inc.'s (PHWB) selection (decision) of a proposal(s) or non-selection thereof, as well as any other item procured competitively, non-competitively (sole-source), or by other means including, small purchase, Request for Proposal (RFP), etc. as described in the Procurement section of Pasco-Hernando Workforce Board, Inc.'s Administrative Plan, any party disputing such decision has the right to appeal. The following is PHWB's process for handling such disputes:

1. Within 10 days of PHWB's selection, the disputing party may appeal in writing to the PHWB Executive Committee. The appeal should be addressed to PHWB's Chairperson and should request the opportunity to present the disputing party's position as it relates to PHWB's selection or non-selection of protesting entity.
2. Within 10 days of receipt of an appeal, the Executive Committee will notify the disputing party in writing, of the date, time and place at which the Executive Committee will hear the appeal.
3. The Executive Committee will render a decision and notify the disputing party of its decision within 10 days of hearing the appeal.
4. The Executive Committee will either let the original selection decision stand, or may recommend to the full PHWB reconsideration of the selection/proposal/procurement and call for a vote to enter into negotiations for funding, purchasing, procuring services, etc. as decided by the board.

The disputing party shall exhaust all administrative remedies with the sub-recipient before pursuing a protest at a higher level. Should the disputing party desire to pursue an unacceptable decision to a higher level of authority, it may do so by contacting:

Director, Agency for Workforce Innovation
107 E. Madison Street
Caldwell Bldg.
Tallahassee, FL 32399-4120

A dispute or complaint that alleges criminal wrongdoing in the procurement process should be brought to the attention of:

Regional Administrator
U.S. Department of Labor/ETA
1371 Peachtree Street, Northeast, Room 400
Atlanta, GA 30307

and simultaneously, copies should be mailed to:

Inspector General, AWI
107 E. Madison Street
Caldwell Bldg.
Tallahassee, FL 32399

Director, Agency for Workforce Innovation
107 E. Madison Street
Caldwell Bldg.
Tallahassee, FL 32399-4120

EXAMPLES OF POSSIBLE BENCHMARKS:

Job Orders

- Each unique employer would be worth \$135.00 (640 max) and each job order worth \$60.00 (1,399 max).
- Each additional 7 unique employers the contract would be worth a lump sum payment of \$1,250.00 (maximum of 112 additional employers – total possible earnings \$20,000.00).
- Also, a lump sum benchmark of \$5,000.00 would be payable at the end of the contract if the ratio of employers improved to 1.5 to 1 (Pasco to Hernando) by June 30, 2012.
- A lump sum payment of \$4,660.00 would be payable at the end of the contract if the average wage of job orders is \$11.36/hr or higher.

Job Fairs

- \$5,000.00 per job fair held according to the standards outlined.

Improved Outreach & Brand Recognition

- \$5,000.00 for an approved plan submitted prior to December 31, 2011.
- \$15,000.00 per quarter for plan implementation

Entrepreneurial Programs

- Curriculum development and submittal \$2,300.00
- \$2,100.00 per entrepreneurial class given according to set standards (18 max)

Employer Business Summit

- \$5,000.00 for plan submittal and acceptance in accordance with request standards by December 31, 2011
- \$5,000.00 for summit completion

Business Focused Surveying -

- \$1,200.00 for each survey completed and submitted in accordance to requested standards (maximum of 6 surveys)