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## Invitation to Negotiate ITN # 18-0462

### TARGETED SECTOR INITIATIVES (TSI): TO PROMOTE CAREER LADDER, BUSINESS RETENTION & SKILLS UPGRADE TRAINING FOR EMPLOYED WORKERS

**Issued: August 9, 2018**

**Responses Accepted: August 9, 2018 until funding is fully obligated**

**PURPOSE:** The purpose of this Invitation to Negotiate (ITN) is to elicit responses from qualified employers, entities that carry out programs under the National Apprenticeship Act, and/or public institutions of higher learning located in Hillsborough County Florida, for the provision of training for their existing workforce in alignment with our organization's workforce initiatives. This program will provide reimbursement to pay for pre-approved, direct training costs of industry and occupation specific training at a rate of up to 50 percent of the actual costs of training.

Designed to assist existing employees in developing higher technical skills and receiving increased wages, this program is not intended for onboarding, new hire, or soft skills training. This program is also designed to improve workforce availability and skills to support the identified targeted sectors within Hillsborough County. This strategy serves to promote business retention and contribute to the overall economic growth of the region.

Funding will be limited to an amount not to exceed \$25,000 per qualified organization. However, should funding permit, proposals that exceed \$25,000 will be considered based on the cost per trainee and type of training proposed, up to \$50,000. Training must lead to a certification as defined by the USDOL in the Definitions section on page two of this document. Training in "soft skills" as defined on page three will not be considered for funding.

**BACKGROUND:** CareerSource Tampa Bay is a 501(c) (3) non-profit organization. The CareerSource Tampa Bay Governing Board is appointed and designated by the local Board of County Commissioners to act as the Workforce Development Board under provisions of the Workforce Innovation and Opportunity Act. CareerSource Tampa Bay has requested and received certification as the local Workforce Development Board by CareerSource Florida, the State of Florida Workforce Development Board. This public-private partnership supports and promotes economic growth through workforce development.

The Board of CareerSource Tampa Bay is comprised of representatives from local businesses, educational entities, labor organizations, community-based organizations, economic development agencies, center partners, and from other individuals deemed appropriate, are appointed by the local county Board of County Commissioners and certified by the Governor of the State of Florida once every two years.

## **DEFINITIONS:**

### **1. Certificate - Per the USDOL Employment and Training Administration's (ETA)**

**definition:** Credentials include, but are not limited to, a high school diploma, GED, or other recognized equivalents, post-secondary degrees/certificates, recognized skill standards, and licensure or industry-recognized certificates.

*“Certificate - A certificate is awarded in recognition of an individual's attainment of measurable technical or occupational skills necessary to gain employment or advance within an occupation. These technical or occupational skills are based on standards developed or endorsed by employers. Certificates awarded by workforce investment boards are not included in this definition. Work readiness certificates are also not included in this definition. A certificate is awarded in recognition of an individual's attainment of technical or occupational skills by:*

- 1. A state educational agency or a state agency responsible for administering vocational and technical education within a state.*
- 2. An institution of higher education described in Section 102 of the Higher Education Act (20 USC 1002) that is qualified to participate in the student financial assistance programs authorized by Title IV of that Act. This includes community colleges, proprietary schools, and all other institutions of higher education that are eligible to participate in federal student financial aid programs.*
- 3. A professional, industry, or employer organization (e.g., National Institute for Automotive Service Excellence certification, National Institute for Metalworking Skills, Inc., Machining Level I credential) or a product manufacturer or developer (e.g., Microsoft Certified Database Administrator, Certified Novell Engineer, Sun Certified Java Programmer) using a valid and reliable assessment of an individual's knowledge, skills, and abilities.*
- 4. A registered apprenticeship program.*
- 5. A public regulatory agency, upon an individual's fulfillment of educational, work experience, or skill requirements that are legally necessary for an individual to use an occupational or professional title or to practice an occupation or profession (e.g., FAA aviation mechanic certification, state certified asbestos inspector).*
- 6. A program that has been approved by the Department of Veterans Affairs to offer education benefits to veterans and other eligible persons.*
- 7. Job Corps centers that issue certificates.*
- 8. Institutions of higher education which is formally controlled, or has been formally sanctioned, or chartered, by the governing body of an Indian tribe or tribes.”*

**2. National Apprenticeship Act** - The National Apprenticeship Act, also known as the Fitzgerald Act, authorizes and directs the Secretary of Labor to formulate and promote labor standards that are necessary to safeguard the welfare of apprentices; bring together employers and labor to implement and formulate apprenticeship programs; encourage contracts of apprenticeship; and cooperate with state agencies that promote apprenticeship. The Secretary of Labor may publish information that relates to existing and proposed labor standards of apprenticeship. In order to carry out these activities and receive relevant information, the act grants the Secretary the authority to appoint national apprenticeship advisory committees which includes representatives from labor, educators, employers, and officers of other executive departments.

**3. Public Institutions of Higher Learning** - Public post-secondary educational institutions eligible to receive Federal funds under Title IV of the Higher Education Act of 1965 and that provide programs leading to associate degrees, baccalaureate degrees or certificates. This includes accredited universities and community colleges as well as some technical institutes.

**4. Soft Skills** - is a “term often associated with a person's "EQ" (Emotional Intelligence Quotient), the cluster of personality traits, social graces, communication, language, personal habits, interpersonal skills, managing people, leadership, etc. that characterize relationships with other people” (Career Opportunities News, 2002). The following are examples of soft skills training that **cannot** be funded:

- New hire orientation
- Workplace literacy or soft skills such as sales, leadership, management and similar non-technical skills.

**5. Targeted Sectors** – The organization applying for funding must be classified in one of the below targeted industry sectors.\*

- a. Healthcare
- b. Manufacturing/Construction
- c. Information Technology
- d. Financial & Professional Services

*\*Apprenticeships in any sector, including a sector/industry not listed above, are eligible to apply for funding.*

**6. Employed Worker** - For the purposes of this program, an employed worker is defined as follows:

- At least one employee of the applicant business working at least 37.5 hours per week and receives a W-2;
- At least 18 years of age;
- A citizen of the United States or a non-citizen whose status permits employment in the United States;
- A Florida resident working at a physical location in Florida; and
- Employed six months before the signature date of the application.

**QUALIFICATIONS:** Through this ITN, CareerSource Tampa Bay intends to individually select and negotiate a formal agreement with multiple qualified organizations within the following parameters:

1. Organizations and entities eligible to apply must fall under at least one of the following three categories:
  - Employer
  - Entity that carries out programs under the National Apprenticeship Act
  - Public Institution of Higher Learning located in Hillsborough County.
2. Respondent employers, entities that carry out programs under the National Apprenticeship Act registered apprenticeship programs, and public institutions of higher learning must be approved to do business in the State of Florida and have not been suspended or debarred from doing business with the state or federal government.
3. Training must meet the USDOL guidelines for a certificate/credential. Additional points will be awarded to organizations who will provide training that results in a degree, industry certification, and/or license. Examples of industry certifications include CompTIA certification or NIMS credentials. Examples of occupational licenses include Pharmacy Technician and Registered Nurse.

4. The workforce board reserves the right to request detailed curriculum for each proposed training program for evaluation prior to approval of funding.
5. Trainees must be existing full-time employees as specified in the Definitions section above. Trainee wages cannot fall below \$12.00 per hour after training or exceed \$26.00 per hour before training.
6. Adequate documentation of the training is required for all expenses incurred and paid. Organizations will be required to provide a minimum of up to 50 percent of the requested direct training costs, i.e. instructor's wages/tuition, textbooks and manuals.
7. Employers requesting reimbursement for internal training are required to clearly identify how the requested reimbursement amount of direct training costs is determined/calculated with their response. The workforce board reserves the right to request documentation to support the determination/calculation of the actual direct training costs prior to approval of funding. Proper documentation to support actual direct training costs/expenses will be required to issue reimbursement.
8. Reimbursement is limited to a maximum of 50 percent of direct training costs. All respondents will be required to provide resources and/or leveraged funds equivalent to a minimum of 50 percent of the total funding. With proper documentation, up to 50 percent of direct training costs/expenses are reimbursable through the grant, i.e. instructors' wages, tuition, textbooks, materials and supplies. Additional resources and/or leveraged funds can include trainee wages, facility usage if training occurs at the employer's work site, prorated training equipment purchase, and travel costs if applicable. Proper documentation to support direct training costs/expenses and leveraged resources inclusive of the above items as applicable will be required by the employer with the submission of each invoice.
9. Examples of disallowed costs for reimbursement include:
  - a. Employee/trainee wages and fringe benefits (can be reported as leveraged resources)
  - b. Compensation or consultant fees not directly related to the provision of training
  - c. Costs incurred prior to the date of the contract
  - d. Capital improvements, travel, food, or membership fees/dues
  - e. Purchase of employee assessment systems or systems usage licenses
  - f. Equipment
10. Eligible respondents must be in good financial standing and be able to provide a DUNS number and/or most recent financial statements.
11. The receipt of other local, state or federal training funds through CareerSource Florida or other funders must be disclosed in the respondent's application. Organizations receiving training cannot use grant funds to subsidize other training and/or cover the same training.
12. If awarded, respondents will be required to maintain compliance under the Workforce Innovation and Opportunity Act (WIOA) as guidance and implementation are ongoing.

**QUESTION AND ANSWER PERIOD:** All questions concerning this ITN should be emailed by 5:00 P.M. August 24, 2018 to [EWT@careersourcetampabay.com](mailto:EWT@careersourcetampabay.com). Written responses will be posted to <https://www.careersourcetampabay.com/pages/rfps> by 5:00 p.m. EDT, August 31, 2018. No phone calls please.

**SUBMISSION OF RESPONSES:** Qualified employers, entities that carry out programs under the National Apprenticeship Act and/or public institutions of higher learning located within Hillsborough County, Florida interested in submitting a response to this Invitation to Negotiate must submit their proposal electronically via the following link: <https://ewt.careersourcetampabay.com>. Responses submitted in hard copy, email or any other means other than the above link will not be accepted, be considered non-responsive and/or not considered for funding.

Failure to submit the application at least 30 business days prior to the desired start date of training may cause valuable training to be missed. Please note, however, that submittal within this timeframe does not guarantee that the approval date will be on or before your training start date.

Submission of the response is solely and strictly the responsibility of the Respondent. Responses received once funding is obligated will not be funded and the sender will be notified via email. The cost of preparing a response to this ITN shall be borne entirely by the Respondent.

CareerSource Tampa Bay reserves the right to reject any or all responses, to re-advertise this ITN, to postpone or cancel this process, to waive irregularities in the process or in responses thereto; and to change or modify the project schedule at any time. Any responses received that do not include resources and/or leveraged funds of a minimum of 50 percent of direct training costs will be considered non-responsive and will not be included with the proposals to be reviewed by the committee.

**SELECTION:** CareerSource Tampa Bay will enter into negotiations with multiple organizations. The selection committee, comprised of CareerSource Tampa Bay staff will review and score each response. Scoring will be based using the following rubric. **Any organization that scores below a 70 will not be considered for funding. Only scores 70 and above will be considered for funding.**

The Selection Committee reserves the right to request clarification on submitted responses. Should CareerSource Tampa Bay be unable to negotiate a final contract, negotiations with that organization will be formally ended.

CRITERIA	WEIGHT FACTOR
<p><b>1. Requirements</b>  <b>"No" marked in any category indicates the proposal is not responsive.</b> The proposal will not be considered for funding.</p> <p>a. Sound Financial Condition- Appendix A: Proposer shows evidence of sound financial condition. Dunn &amp; Bradstreet Number must be provided.  Yes _____ No _____</p> <p>b. Training meets the USDOL/ETA guidelines for training certificates.  Yes _____ No _____</p> <p>c. Trainees are/will be existing full-time employees. Trainee wages do not fall below \$12.00 per hour after training or exceed \$26.00 per hour before training.  Yes _____ No _____</p> <p>d. Resources provided by responding organization are at minimum 50% of the total direct training costs.  Yes _____ No _____</p> <p>e. Employer industry falls within the sectors listed in the solicitation.  Yes _____ No _____</p> <p>f. Employers requesting reimbursement for internal training clearly identify how the requested reimbursement amount of direct training costs is determined/calculated with their response (supplemental attachment).  Yes _____ No _____ N/A: External training provider _____</p>	<p><b>MANDATORY</b></p>
<p><b>2. Strategy/ Project Description</b></p> <p>a. Training will result in a degree, industry certification, and/or license.– 20 Points</p> <p>b. The number of employees to be served during the period must be realistic for completion within the specified time period. Training is scheduled to be completed by April 15, 2019. - 5 Points</p> <p>c. Employees will receive a wage increase after training. Respondents that do not indicate a wage increase will receive 0 points. (Anticipated Outcomes) -10 Points</p> <p>d. Training promotes job creation/retention. (Anticipated Outcomes) - 5 Points</p> <p>e. Training is crucial to promote business retention. (Anticipated Outcomes) - 5 Points</p> <p>f. Training falls under the National Apprenticeship Act. - 5 Bonus Points</p>	<p><b>45 Points</b></p> <p><b>BONUS</b></p>
<p><b>3. Cost of the Services</b>  Costs will be calculated based on funds requested divided by the number of unique eligible employees to be served. Points will be awarded on a <b>cost per individual to the workforce board</b> as follows:</p> <ul style="list-style-type: none"> <li>▪ \$0-500=35 points</li> <li>▪ \$501-1000= 30 points</li> <li>▪ \$1001-1500= 25 points</li> <li>▪ \$1501-2000= 20 points</li> <li>▪ \$2001-2500= 15 points</li> <li>▪ \$2501-3000= 10 points</li> <li>▪ \$3001 &amp; higher= 0 points</li> </ul> <p><b>Note:</b> The maximum reimbursement for individual training costs is limited to \$3,000 per trainee.</p>	<p><b>35 Points</b></p>
<p><b>4. Provider Resources</b>  Amount of provider resources or leveraged funds to be provided by the employer. The resources/ leveraged funds must enhance the intended scope of services. <b>A minimum 50% match of direct training costs is required.</b> Points will be awarded as follows:</p> <p>50% = 0 points  51%-59% = 10 points  60%-69% = 15 points  70% or higher = 20 points</p>	<p><b>20 Points</b></p>
<p><b>TOTAL SCORE</b></p>	<p><b>100 Points</b></p>

**NOTIFICATION:** Once the application has been reviewed, an email will be sent to the contact listed in the application advising of approval or requesting additional information.

**CONTRACT:** The term of agreements shall terminate by **April 30, 2019**. All training must be completed by **April 15, 2019** with complete invoices submitted no later than the term date of the agreement. The respondent is expected to have carefully assessed training needs so that it will only apply for the funds needed for training that can be completed by April 15, 2019.

The application is approved based on the training outlined in the proposal. If the approved training needs to be modified, a substitution can be requested on the provided form to change the course or the training provider. There is a maximum of two substitution requests per lifetime of the grant. CSTB will evaluate the request and the organization will be notified via email of the approval or denial of the substitution.

Specific forms will be required and provided upon contract execution. Organizations will be required to submit documentation to support the dollar amount of leveraged resources/matching funds listed in their proposal with each invoice to receive reimbursement. The following documents will be required with the submission of each invoice to process reimbursement:

1. Completed invoice template in the format provided by CareerSource Tampa Bay, inclusive of a participant list of trainees and reporting and documentation to support the amount of Respondent resources and/or leveraged funds provided in category and dollar amount.
2. Documentation of paid invoices provided to Respondent by training provider and/or educational institutions. For employers utilizing internal training, documentation to clearly support the actual direct costs that aligns with their ITN response is required for reimbursement.
3. Completed trainee packets, to include:
  - a. 2018-2019 Employed Worker Application (Participant Profile).
  - b. Grievance/Complaint and Whistleblower Process for EWT forms.
  - c. Legible and complete copies of the trainee I-9 form or Driver's License and Social Security Card.
  - d. Printed Selective Service Registration Verification form for all males born after December 31, 1959, unless the individual meets exemption requirements as defined by the Selective Service System: <https://www.sss.gov/Registration/Who-Must-Register/Chart>.
  - e. If identified as a veteran, a copy of the trainee's DD214 form indicating characterization of discharge (Member 4 form).
  - f. Current INS information to support applicant's right to work in the U.S., if applicable.
  - g. Certificates of Completion.

Organizations entering into agreement with CareerSource Tampa Bay must agree to allow CareerSource Tampa Bay, Florida Department of Economic Opportunity, U.S. Department of Labor (USDOL), and U.S. Department of Health and Human Services (USDHHS) access to any records directly related to this program. Records must be maintained for three (3) years subsequent to the conclusion of this program.

The successful Respondent(s) may not make an assignment of their obligations resulting from award of a contract in response to this ITN.

CareerSource Tampa Bay reserves the right to request additional services. If the Respondent is to be engaged to perform these additional services, the scope and fee will be negotiated in a separate contract to be awarded as a result of this solicitation. Such contract modification agreements, including provisions for additional fees are valid only if approved by both the Respondent and the CareerSource Tampa Bay Board.