

Workforce Florida, Inc.

September 30, 2004

“Entrepreneurial Training and Business Technical Assistance for Targeted Groups” Pre-Bid Conference Recap and RFP Addendum

The pre-bid conference for the Request for Proposals titled, “Entrepreneurial Training and Business Technical Assistance for Targeted Groups”, was held as scheduled at the offices of Workforce Florida, Inc. (WFI) at 2:00 PM on Tuesday, September 28, 2004. WFI staff discussed the intent of the RFP, the program requirements and the process for submitting proposals. This was a ‘non-mandatory’ pre-bid conference and those prospective respondents who were unable to attend are eligible to submit a proposal. The following is a list of the persons who attended the conference:

ATTENDEE	REPRESENTING
Alan Tiano	Hispanic Unity of Florida
Mike Evans	Florida High Tech Corridor
Yanina Rosario	Hispanic Business Initiative Fund
Ron Ogden	ATS
Mike Neville	ABILITIES of Florida
Michael Weyant	Axon Technologies
Jesse Rios	Florida Alliance for Assistive Services and Technologies
Robert Provitt	The Bridge Project
Jayne Burgess	Workforce Florida, Inc.
Mike Johnson	Workforce Florida, Inc.

This pre-bid conference recap represents the ‘official’ WFI position on the matters that are discussed here. Attendees were reminded that answers that were given at the conference were not official and that this pre-bid conference recap would represent WFI’s position on questions and issues that were discussed. Further, attendees were reminded that this recap would be sent simultaneously to all known recipients of the RFP, including attendees, and posted on the WFI web site.

- 1. Discussion Issues:** Staff provided the following reminders about this training and technical assistance initiative and the process of developing and submitting a proposal:
 - Respondents should pay special attention to items that are highlighted in **bold print** or *italics* or underlined or in ALL CAPS. These items are highlighted because they are important to the intent of the RFP or the process for submitting/rating proposals.
 - There is \$700,000 allocated to this initiative and no single project will be funded for more than \$250,000. The training and technical assistance projects can be located in one area of the state, several areas or statewide – there is no competitive advantage for either.

- Respondents (organizations submitting proposals) may subcontract for a portion of these services and use their subcontractor's *experience* in training or providing technical assistance when completing that portion of the proposal that seeks information regarding experience (see Item 4. in Attachment II).
- When assessing the experience of the respondent (or its subcontractors), WFI will be looking at experience 1) providing entrepreneurial training and technical assistance; 2) providing services to one or more of the targeted groups; and 3) working with a regional workforce board(s). WFI will be looking at what kind of connectivity the respondent or its subcontractors has/have with the group(s) it intends to serve
- Respondents are reminded that, if they choose to use subcontractors, WFI will not be a party to any such subcontracts. WFI will negotiate and execute a contract with the respondent. In the case of a partnership or consortium, one organization will have to be identified as the lead agency and it would be with that lead agency that WFI would contract.
- Respondents are reminded that the intent of this initiative is to assist in creating business and creating jobs (the economic development and workforce development strategies in Florida are interdependent); providing services to groups that may have barriers to starting a business or have been under-served by such programs in the past; and, finally, to strengthen the partnership between service providers, the business community *and* the regional workforce boards.
- Contractors will be required to have trainees determined to be eligible for funding under these federal funds (WIA) by a regional workforce board and, if there are any costs associated with that, WFI will pay for those separately. **CLARIFICATION: At the top of Page 4., within the box, there is a 'NOTE'. The underlined section of that NOTE states that WFI will reimburse the contractor for costs regional boards may assess for eligibility determination – that is incorrect, WFI will pay regional boards directly for those services.** The costs for eligibility determination, if any, **SHOULD NOT** be included in the project cost submitted in the proposal (see Item 1. under 'Funding Request' in Attachment I – **DO NOT** include eligibility determination costs in Project Amount).
- Contractors may receive training for inputting data into the state management information system from staff with the Agency for Workforce Innovation in Tallahassee at no cost, except the contractor would be responsible for travel expenses. Since this data entry training is available to contractors free of charge, WFI will not pay for data entry costs separately as it will for eligibility determination services (above).
- Respondents are reminded that these projects are intended to be collaborative efforts (see second paragraph under 6.0, Page 4). It is WFI's intent that, to the extent possible, contractors will involve the business community and local economic development groups *and* regional workforce boards in the projects that are funded as a result of this RFP.
- Respondents are reminded that, if they are awarded funding and they then become a contractor, they must ensure that all of the trainees that are paid for by WFI are WIA eligible and that they retain documentation of eligibility. WFI employs a contract monitoring procedure and if any trainee for which WFI has paid for services is determined not to be eligible when the contract is

monitored, the contract will be required to reimburse WFI for such payments. There will be language to this effect in the contract WFI executes.

2. **Procedural Issues.** Staff provided some reminders to attendees about the process of completing and submitting proposals.
 - Respondents **MUST** use the documents included in the RFP – Attachment I , Proposal Transmittal Document and Attachment II, PROPOSAL – to submit their proposals. **DO NOT** use your own format and **DO** not provide binders and other elaborate materials.
 - Submit seven (7) copies of the proposal (Attachments I & II). One copy must have an original signature. Fax proposals and email proposals are not acceptable.
 - Proposals are to be submitted to WFI’s agent, the Agency for Workforce Innovation – AWI – (see 12.0, Page 12).
 - There will be a committee that reviews proposals and scores them based on the point system (8.2, Pages 8 & 9). AWI will then average those raters’ scores and rank proposals and submit the findings to WFI. WFI will make award decisions and advise AWI which will notify **ALL** respondents (all organizations that submit a proposal) of the award decision by email. The award decision will also be posted to the AWI and WFI web sites.
 - Limit proposals to 20 pages, including the required one-page budget document and the required letter from the regional workforce board(s) in the area in which services will be provided.
 - The ‘award’ date listed in the 10.0 Schedule of Events section on Page 10 is an *estimated* date. Award notices will be sent via email to all respondents, so, if this ‘award’ date (October 22) passes without a respondent having received an email award notice, that simply means that the award has not been finalized.
 - On Pages 10, 11 & 12 of the RFP, WFI has included contract language that represents some of the terms and conditions that will be in the contract (s) resulting from this solicitation. There are attachments (A – B) referenced in that section and included for informational purposes with the RFP. **Attachments A – B will be a part of the contract when it is executed and they DO NOT need to be returned with the proposal.**
3. **Questions/Answers:** The following questions were either submitted in writing to WFI via email or raised at the pre-bid conference. Most of the questions have been paraphrased for space reasons – you will notice that this Q/A section is still fairly large. WFI has made an effort to clarify issues rather than making them more complicated but we admit that that is not always easy. If there is a real or perceived difference between answers provided earlier either via email response or in the pre-bid conference, respondents are reminded that these pre-bid conference recap answers represent WFI’s official position on all questions listed below.

WFI will not accept additional questions regarding this RFP.

Q. What is the difference between a ‘respondent’ and a ‘contractor.’

A. A ‘respondent’ is the organization that submits a proposal. A ‘contractor’ is the organization with which WFI contracts for these services. If its proposal is selected, a respondent will become a contractor.

Q. What will the contractor be required to do to document that a trainee is a member of one the targeted groups – minority, disabled, veteran?

A. Contractors shall require trainees to provide acceptable documentation to the contractor that meets the definitions outlined in the RFP. As an example, if the contractor is targeting veterans, the contractor may require trainees to provide a copy of the trainees’ discharge papers. The contractor shall retain documentation that supports its claim that each trainee it identifies as belonging to a targeted group.

Q. There is language in the RFP that states that non-targeted individuals cannot be denied services. How will that work?

A. The targeting of under-served groups means that the contractor will employ an aggressive program to recruit and enroll individuals in the targeted group. WFI will include language in the contract(s) that will require the contractor to attain a certain level of enrollments in the targeted group even though they might also serve non-targeted individuals. Whether an individual is in a targeted group or not, ALL individuals that are served and paid for by WFI must be eligible under WIA.

Q. Contractors will be required to have eligibility determined by regional workforce boards and WFI will pay those regional boards directly if there are charges. Will WFI attempt to get regional boards to fast track the normal eligibility determination process which can be somewhat lengthy?

A. Yes.

Q. Will WFI pay for non-targeted individuals out of these contract funds?

A. See answer above. Yes, WFI through the contractor cannot deny access to any individual who is determined to be WIA eligible and will therefore pay for enrollments, completions and technical assistance for non-targeted individuals. The contractor, however, would be under no obligation to recruit non-targeted individuals.

Q. Are the funds that the contractor earns from the payments it receives from WFI considered ‘program income’ (see 11.10, Page 12)?

A. No, ‘program income’ means additional income that the contractor may make as a direct result of the contract. In other words, it is income that the contractor would not have made without its contract with WFI. ‘Program income’ must be used to enhance the project or returned to WFI.

Q. If the contractor is in the business of providing entrepreneurial training/technical assistance and it charges other trainees – those that are not paid for under this contract – is that income considered program income?

A. No. If, however, the contractor sets up the training program specifically for this project and that program is being paid for exclusively out of the funds from WFI, the fees it might charge to other attendees would be considered ‘program income.’ In that scenario, the income the contractor would gain from charging fees to other trainees would be income it would not have accrued outside of the

contract. What all this means, is that the contractor could not take the dollars it gets from WFI to set up an entrepreneurial training program and then turn around and make money from that program by charging fees to other students.

Q. Are all regional board clients (those persons the regional board serves through its One-Stop service centers) eligible for this training?

A. No, there are clients being served by regional workforce boards that may be served under other eligibility criteria.

Q. Will respondents be allowed to include additional criteria such as credit capacity or willingness to participate in credit repair counseling?

A. The contractor will not use additional criteria to screen applicants for the program other than WIA eligibility. Again, contractors will target individuals in one or more of the targeted groups but there cannot be other criteria used to include/exclude individuals. WFI will be paying for this training and technical assistance so there should be no reason to use ‘credit capacity’ to potential trainees. If the respondent wants to incorporate credit issues as a part of the training program that’s OK.

Q. Can WFI be more specific about payable deliverables? Are there others beyond training (enrollments and completions), technical assistance and the project assessment?

A. Those three deliverables will be in the contract. If the respondent offers additional services, WFI may incorporate those as deliverables also.

Q. Can a contractor bill for more than one deliverable per participant?

A. Certainly. It is anticipated that there will be three possible payable deliverables for each participant – 1) enrollment into training, 2) completion of training and 3) billable hours for technical assistance.

Q. Can a contractor bill for enrollment and completion in more than one segment – such as marketing and business plans and human resource management – of training for the same participant?

A. No. WFI will pay for one enrollment and one completion per participant. To be paid as a program completion the trainee must successfully complete the entire program.

Q. WFI states that it will pay more for program completions than program enrollments. Are there any pre-established guidelines for charges for these services or does the contractor set its own fees?

A. WFI will set the amounts it will pay the contractor for all contract deliverables. There will be an amount for enrollments, a higher amount for completions because that is what this initiative is trying to achieve, a fixed hourly rate for technical assistance and a fixed amount for the project assessment. The contractor does not set any ‘fees’ unless they are the fees that it might charge for training outside this contract. These deliverable payable amounts will be negotiated during the contracting process. Respondents do not need to identify any of these payable amounts in their proposals – this is a contract issue. WFI will take into account the contract amount the number of trainees and calculate contract payable amounts that it feels are acceptable. The proposed contractor may at that time attempt to negotiate different payable amounts.

Q. Can WFI be more specific about linking to the NEC (see 1.0, Page 1)? Is it enough to refer trainees to the NEC for information or does there need to be a formal agreement between the contractor and the NEC or is a link to the NEC web site on the contractor's web site sufficient?

A. WFI believes that the NEC is an excellent additional resource for participants seeking information to start or expand a business. There does not need to be a formal agreement (but if one exists that should be noted in the proposal). Merely referring participants to the NEC is not enough however. A web site link would be essential – WFI wants respondents to describe how they would accomplish this link to the NEC; what will the respondent do to make that resource available to participants?

Q. Does business technical assistance have to be provided in person or can it be provided by email and/or phone?

A. It could be provided all three ways – in person, by email and by phone. WFI intends that participants have the ability to receive technical assistance in person if that was necessary. Contractors will be required to maintain documentation of billable technical assistance hours.

Q. Would support services (such as transportation and child care) be an allowable cost in the budget or would the regional board One-Stop center pay for these services?

A. For persons within the targeted groups that may have barriers to getting this type of training, support services may be provided by the contractor but those costs would have to be estimated and included in the project amount of funds being requested from WFI and those costs would also need to be identified in the one-page budget. Support services could be an additional or value-added service as described in Item 3 (0 – 5 points) near the bottom of Page 5. The regional boards will not pay for these services.

Q. How will the participants served under this initiative affect regional workforce board performance requirements for entered employment rate, wage rate and other WIA performances tracked by WFI for the region?

[This is a question that may apply more to regional workforce boards than respondents]

A. They won't. These participants or trainees will be entered into the state workforce management information system under a project code assigned to the contractor and tracked as a performance of that contractor. They are not included in regional workforce board performances tracked by WFI – they are not regional workforce board clients. If regional boards want to refer some of their WIA-eligible clients to the contractor and pay for training independent of the contract they may do so. In such cases where the regional board is paying for the training of its own clients those clients or participants cannot be claimed by the contractor as payables under the contract with WFI – in other words, the contractor cannot be paid twice for trainees. The contractor may give priority to participants it wants to serve under its contract with WFI over those referred to it and paid for by regional boards.

Q. What is meant by 'project assessment' in 6.2.3?

A. WFI is interested in the methodologies the contractor would use to determine how much trainees have learned – what is their pre-program and post-program entrepreneurial IQ? Will they be tested at the beginning of training and upon completion? Also, how will the contractor assess the satisfaction of the trainees?

Q. If a trainee completes training could they be awarded a 'credential'?

A. WFI will not award any kind of certification or credential. This type of training is a little different from training that normally constitutes a ‘credential’ in the workforce system. This training does not provide skills necessary to get a job, it provides the skills necessary to start a business. An individual who completes this training wouldn’t be receiving a piece of paper (credential or certificate) that signifies to potential employers that the individual has attained a certain skill level as a candidate for a job.

Q. In 8.2 (third bullet), Page 8, WFI asks if the training has been validated? What is meant by ‘validated’?

A. WFI wants respondents to describe how they have determined that their program is successful. As an example, how many entrepreneurial training completers have actually started a business. WFI prefers that respondents respond to that item in their own way rather than telling them what would constitute an acceptable response. If a respondent does not have some kind of mechanism for determining that its program is successful, WFI would be reluctant to fund training for it.

Q. Must all clients ‘for intake’ be approved by the regional workforce board? Is the regional workforce board the entity through which all ‘intake’ must flow?

A. (NOTE: WFI uses the terms client, participant and trainee interchangeably) Clients must be determined eligible for training services under the WIA by regional workforce boards. That does not mean that those clients would follow the normal intake process that regional workforce boards use for clients they serve directly. To further explain to respondents that may not be familiar with regional workforce board ‘intake’ procedures – when a person comes into a regional One-Stop center seeking services, there is a procedure to enroll that person into the as a participant receiving services at the One-Stop center; that’s what is known as an ‘intake’ procedure. The clients served under these contracts would not actually go through that ‘intake’ procedure at the regional board One-Stop center because they would not be participants for which that One-Stop center is actually providing services – the services would be provided independently by the contractor.

Q. Are white women who are permanent residents of Florida considered minorities?

A. Yes, the final category under the definition of minority person on Page 2 includes ‘an American woman.’

Q. What are the WFI eligibility requirements for the targeted groups?

A. All trainees must be WIA-eligible and meet the definitions listed in 3.0.

Q. What specific confidential information must the contractor provide in contract reports?

A. Participants are entered into the state MIS system by name, Social Security Number, date of birth, gender, race, ethnicity and selective service status if appropriate.

Q. Please clarify the underlined sentence in 6.1.4 about assessing separate charges to trainees.

A. WFI is paying for training and technical assistance for individuals under the contracts that will result from this RFP. The individuals that the contractor claims as deliverables under the contract and which are paid by WFI, will not be charged any other, separate charges for training and technical assistance. In effect, those services will be free to the participants.

Q. Are labor costs incurred by regional boards for eligibility determination and data entry considered administrative costs as contemplated in the reference to the budget in 7.3?

A. Eligibility determination costs will be paid directly by WFI and should not be considered in the budget. Data entry costs would not be considered administrative costs.

Q. Would letters of support from additional partners – community-based or faith-based organizations, business groups, training providers, etc. – be considered part of the 20-page limit on proposals?

A. Yes. Respondents should consider providing information that was not requested when completing their proposals within the 20-page limit.

Q. Would potential costs related to linking with the NEC be considered administrative costs for purposes of completing the required one-page budget?

A. No, they would be considered expenditures that benefit clients directly.

Q. What does WFI consider ‘in-kind’ leveraged funds?

A. Generally, in-kind funds are the donation of time, space or services. ‘Time’ could be assistance by a local partner (such as a speaker) provided at no charge to the contractor; ‘space’ could be meeting rooms provided for training at no cost; ‘services’ could be copying of training materials, etc. In-kind funds need to be identified and the methodology used to determine the *value* of in-kind funds needs to be stated – as an example, if a speaker normally charges a speaking fee but is waiving that fee to benefit this project, that normal fee would establish the *value* of this in-kind donation.

Q. Are federal negotiated indirect rates for universities/non-profits authorized for this performance-based contract?

A. No. Respondents that may be public entities or those who may have had other grants either directly from the federal government or the State of Florida are encouraged to put such grants aside when considering how this contract will be administered. Respondents need to put themselves in the position of a ‘vendor’ providing services and not relate that to any other project or agreement.

Q. Can a respondent submit a proposal for less than the \$250,000 maximum indicated on Page 2?

A. Yes. WFI will not consider proposals that exceed \$250,000, but if a respondent wants to offer a program that is smaller in scope and less costly, it will be considered equally with other larger projects.

4. **Addendum to the RFP.** Three issues relating to the terms and conditions included in the RFP were discussed at the pre-bid conference. One was a change that WFI had decided to make to the RFP and the other was an error pointed out to WFI by one of the attendees. The other change which is notable is that WFI will extend the term of contracts resulting from this RFP from June 30, 2005 to **December 15, 2005.** **That provides an additional 6 months for these projects.** Listed below are those changes:

(1) In Section 5.0, within the ‘NOTE’ near the top of Page 4 it states that, “...- WFI will reimburse the contractor for these costs.”

Change to read, “...- WFI will pay regional workforce boards directly for these eligibility determination costs.”

[this change means that the contractor WILL NOT pay for eligibility determination costs and then be reimbursed by WFI but rather WFI will pay the regional boards directly – these costs therefore should not be included in the proposal amount or in the budget]

(2) In Section 8.2 on Page 8, within the box titled *Leveraged Funds* in the narrative it states a “maximum of 10 points” are available for leveraged funds. That should be changed to a “maximum of 5 points” are available for leveraged funds. The ‘0 -5 Points’ in the adjacent box is CORRECT.

[this change merely corrects an error in the RFP]

(2) In Section 2.0 at the top of Page 2 it states that contracts will expire on June 30, 2005. That should be changed to “...will expire on December 15, 2005.”

[this change means that resulting contracts will include an additional 6 months]

NOTE: WFI will not accept additional questions regarding this Request for Proposals.

The DEADLINE for the receipt of proposals remains –

5:00 PM, Eastern, on October 13, 2004